

# Jungheinrich Expenses System – Employee and Manager User Guide

---

## Contents

Overview .....	4
Logging on to System .....	5
Forgotten Password: .....	6
Claim Summary .....	7
Start a new claim .....	7
Fuel and Mileage claims.....	7
Making a Fuel and Mileage Claim: Weekly Input .....	8
Fuel and mileage input fields per line .....	9
Making a Claim - Daily input.....	12
Screen elements .....	12
Select the date.....	12
Making a Fuel and Mileage claim .....	13
Fuel and mileage input fields .....	14
Making a 'Rate per Mile' claim.....	17
Summary .....	17
Add a Rate per Mile (RPM) claim to a day on which other expenses already exist:.....	17
Add a Rate per Mile (RPM) claim for another day: .....	17
Company vehicle user and No Fuel Card.....	17
Rate per mile input fields – company car .....	17
Company vehicle user and a Fuel Card .....	19
Rate per mile input fields – own vehicle .....	19
Making an Allowance Claim.....	20
Summary .....	20
Add an allowance to a day on which other expenses already exist: .....	20
Add an allowance for another day .....	20
Claim an allowance – input fields .....	21
Making a Claim for Miscellaneous Expenses.....	23
Summary .....	23
Add a miscellaneous claim to a day on which other expenses already exist: .....	23
Add an allowance for another day .....	23
Claim a Miscellaneous expense– input fields .....	24
Making a Claim for Service Materials - Engineers and ASMs only.....	27

Summary .....	27
Add a Service Materials claim to a day on which other expenses already exist:.....	27
Add a Service Materials claim for another day .....	27
Claim a Service Materials expense– input fields .....	28
Making a Claim for Travel Expenses .....	30
Summary .....	30
Add a Travel expense claim to a day on which other expenses already exist:.....	30
Add a Travel Expense claim for another day .....	30
Claim a Travel expense– input fields .....	31
Making a Claim for In House Meeting/Entertainment Expenses .....	33
Summary .....	33
Add an In-house expense claim to a day on which other expenses already exist:.....	33
Add an In-house Expense claim for another day .....	33
Claim a Meeting/In-House expense– input fields .....	34
Adding Employees to a Meeting/In-House claim .....	36
Making a Claim for Customer Entertainment Expenses .....	38
Summary .....	38
Add a Customer Entertainment expense claim to a day on which other expenses already exist: .....	38
Add an Entertainment Expense claim for another day .....	38
Claim a Customer Entertainment expense– input fields .....	39
Reviewing your progress – the Claim Summary Page .....	40
Claim summary – links .....	40
Editing your Claim .....	42
Editing Fuel and Mileage.....	43
Editing Rate per Mile claim .....	44
Editing Allowance .....	45
Editing Miscellaneous .....	46
Editing Travel.....	47
Editing Meetings/In-House .....	48
Editing Customer Entertainment .....	49
Editing Service Materials.....	50
Changing the ‘Type of Work’ for a day .....	51
Submitting a claim for approval .....	52
Submit Claim - input fields .....	53
Claim Rejected by Manager .....	55
Claim rejected by Finance .....	57

Claim approved by Finance .....	58
Manager - View submitted claims .....	59
Manager - rejecting a claim .....	60
Manager - approving a claim .....	60
Manager - appointing an alternative approver .....	61
Manager - removing an alternative approver .....	62
Logging out of the system .....	63

## Overview

The Jungheinrich Expenses system replaces the Excel spreadsheet that has been used for submitting Expense Claims.

Claims will now be entered via web pages on the company intranet and data will be stored on a database. This means that your current and former claims will be available to refer to and monitor the progress of at your convenience.

The system will calculate the **VAT** where applicable, **so please enter all amounts as gross values**.

**Foreign currency** will be converted by the system based on the daily bank rate or a rate entered by you where you have evidence as described in the Expense policy.

Claim submission and approval will be handled by the system based on the employee hierarchy defined in the CHRIS personnel system. Only receipts need to be sent to the Finance section. A **receipt code** will be provided by the system to identify the claim to which they belong.

**Only the current and immediately previous period will be available for claim entry. Any claims not submitted for earlier periods will not be paid, except where special circumstances apply.**

The system will detect any cost centre changes in the CHRIS data and will start a new claim automatically where required, so that the claims go to the correct Managers for approval.

**New claims will not now be required for changes of vehicle** as these are now recorded on each day's data.

## Logging on to System

**IMPORTANT NOTE – do not use the navigation buttons on your browser (i.e. Internet Explorer Forward and Back arrows) as the system will not function correctly.**



All levels of user have a secure logon with a username and password that is known only to the individual user. The username will be based on data from the Chris system i.e. Surname and employee number. It will be important that this confidentiality is maintained as the user id will be used within the audit trail of the approval process.

You will have been sent an email informing you of your login details once they have been transferred from the CHRIS system. **Note that surnames containing apostrophes will have had these removed from the user name.**

The Intranet address for the Expenses system is:

[wwwuk.intranet.jungheinrich.com:84/adminlogin.aspx](http://wwwuk.intranet.jungheinrich.com:84/adminlogin.aspx)

Example 1 Login page

All passwords will be initially set to 'password' and you will be prompted to change it to one of your choice when you first logon.

Type in your User Name and Password and click the Login button.

If this is the first time you have logged in, you will see this page

The screenshot shows the 'Enter new password' page of the Jungheinrich Expenses system. At the top left is the Jungheinrich logo with the tagline 'Machines. Ideas. Solutions.'. The page title is 'Enter new password'. Below the title is a grey navigation bar with a 'Back' link. The main content area has a yellow background and contains a grey header box with the text: 'Welcome to the Jungheinrich Expenses system - please enter your new password and the first part of your home postcode'. Below this are three input fields labeled 'Password', 'ConfirmPassword', and 'Postcode'. A 'Submit' button is located at the bottom left of the yellow area.

#### Example 2 Set up password and default start post code

Type in your chosen password in both boxes and click Submit.

Your password must be at least 6 characters in length and must not be 'password' again.

Enter the first section of your **home postcode** for any business mileage claims, e.g. MK7.

**Forgotten Password:** clicking the 'Forgotten Password' link on the login page will allow you to enter your email address to have your password reset to 'password' so that you can restart the process. You will receive an email informing you that your password has been successfully reset.

The screenshot shows the 'Email forgotten password' page of the Jungheinrich Expenses system. At the top left is the Jungheinrich logo with the tagline 'Machines. Ideas. Solutions.'. The page title is 'Email forgotten password'. Below the title is a grey navigation bar with 'Home' and 'Back' links. The main content area has a yellow background and contains a text prompt 'Please type your Email Address' next to a single input field. A 'Submit' button is located at the bottom left of the yellow area.

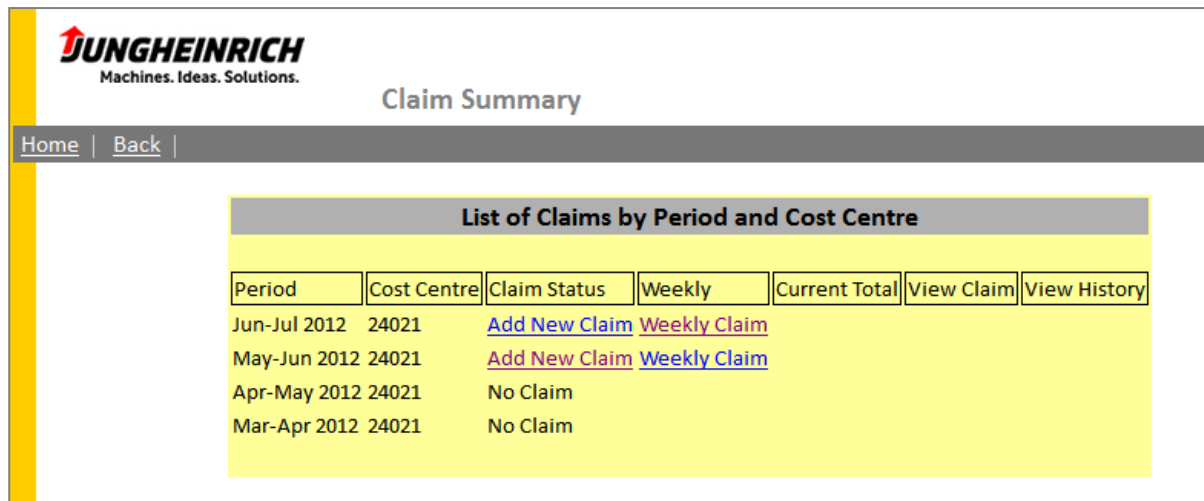
#### Example 3 Forgotten password

## Claim Summary

When you have successfully logged in you will see your home page.

You will see different options depending on your User Role.

If you are not a Manager or Approver you will see the Claim Summary page:



List of Claims by Period and Cost Centre						
Period	Cost Centre	Claim Status	Weekly	Current Total	View Claim	View History
Jun-Jul 2012	24021	<a href="#">Add New Claim</a>	<a href="#">Weekly Claim</a>			
May-Jun 2012	24021	<a href="#">Add New Claim</a>	<a href="#">Weekly Claim</a>			
Apr-May 2012	24021	No Claim				
Mar-Apr 2012	24021	No Claim				

### Example 4 – Claim summary

This page shows you your claims by period and cost centre. At present in this example the employee has not started to input any claims for the two periods that are open.

## Start a new claim

This function allows you to start a new claim for the **current period or one for the previous period only**. It also allows you to add new claim lines to an existing claim.

## Fuel and Mileage claims

These are primarily differentiated in the system as being either **Fuel and Mileage** claims – where the employee enters all fuel spend and miles travelled for the period, or **Rate per Mile** claims where the employee has either used their own vehicle or has the use of a company vehicle but has no fuel card. The HMRC rates will be used from the Rates table.

Each type of fuel claim can be entered daily or for **Fuel and Mileage claims only a weekly fuel and mileage entry screen is available**. This will apply to employees with a company car and fuel card travelling in the UK only. **Foreign currency conversions will be available on the daily input screen**.



## Making a Fuel and Mileage Claim: Weekly Input

Not to be used for employees using either their own vehicle or company vehicle users who are claiming mileage only. If you have taken your car abroad, please use the daily fuel and mileage claim page to handle the foreign currency amounts.

Select the **Weekly Claim** link from the Claim Summary page.

### Example 5 Weekly claim selection page

The system now presents you with a button for each week of the period ending on a Saturday. At the start and end of the period there will be shorter weeks depending how the days fall. In this period the 21<sup>st</sup> falls on a Saturday and so there is effectively only one day in the first week.

The red squares alongside each week show you how many days you have entered data for.

Select the button alongside the week dates that you wish to enter values for.

### Example 6 - First Week with only one day

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer

### Add Weekly Claim

Home | Back

Surname: White Forenames: Robert Employee No: 12068 Job Grade: SE Cost Centre: Car Registration: WP11EBV Report To: Robert Carnell

**Weekly Fuel input for week 29/07/2012-04/08/2012**

Start Mileage: 0

Day	Date	Type of Work	Vehicle Reg	Miles			Postcode		Dial Card		Non Dial Card	
				Business	Personal	Total	Start	End	Fuel (£)	Oil (£)	Fuel (£)	Oil (£)
Sunday	29/07/2012	Personal	WP11EBV				MK7				<input type="checkbox"/> Vat	<input type="checkbox"/> Vat
Monday	30/07/2012	Customer Visit	WP11EBV				MK7				<input type="checkbox"/> Vat	<input type="checkbox"/> Vat
Tuesday	31/07/2012	Customer Visit	WP11EBV				MK7				<input type="checkbox"/> Vat	<input type="checkbox"/> Vat
Wednesday	01/08/2012	Customer Visit	WP11EBV				MK7				<input type="checkbox"/> Vat	<input type="checkbox"/> Vat
Thursday	02/08/2012	Customer Visit	WP11EBV				MK7				<input type="checkbox"/> Vat	<input type="checkbox"/> Vat
Friday	03/08/2012	Customer Visit	WP11EBV				MK7				<input type="checkbox"/> Vat	<input type="checkbox"/> Vat
Saturday	04/08/2012	Personal	WP11EBV				MK7				<input type="checkbox"/> Vat	<input type="checkbox"/> Vat

Submit

#### Example 7 - Third week with seven days

#### Fuel and mileage input fields per line



Use the TAB key after you have entered data otherwise the tick boxes and drop down menus may not work correctly.

**Start Mileage** - when you start a claim for a period the system will check if there is an end mileage recorded on a previous claim for your company vehicle and will present this in the Start Mileage field. In the example above, the start mileage is zero. This value can be changed and will stored as the Start Mileage for this period.

The **date of claim** has been populated for you and cannot be altered.

**Type of work** is a mandatory field – in the above example, because the user is an Engineer this field has been defaulted to 'Customer Visit' but it can be changed.

Weekends default to 'Personal' - but can be changed

You do not have to enter values for every day – **if you want to leave a line empty** you must select '**No entry today**' from this drop down menu to prevent the form validation prompting you for mandatory values.

Day	Date	Type of Work
Sunday	22/07/2012	Customer Visit
Monday	23/07/2012	Customer Visit
Tuesday	24/07/2012	Please select..
Wednesday	25/07/2012	No entry today
Thursday	26/07/2012	Visit to JH Branch
Friday	27/07/2012	Customer Visit
Saturday	28/07/2012	Overseas Visit
		Suppliers Visit
		Office base
		Repair
		Personal
		Site Visit

Submit

#### Example 8 – Type of work selection options

The **vehicle registration** has been defaulted to the company vehicle from the Employee label in this instance. You can overtype this with a different registration if you have used a hire or pool car on certain days.



If you have used **your own personal vehicle** for any day you cannot enter the details on this page and should use the daily Rate per Mile page.

**Business miles** and **personal miles** – enter the business and private miles travelled for the day. These should be entered as whole numbers – NB Personal Miles are not required for Company Directors. As you enter these figures the system will display a **total** for each day in the grid. **No business miles can be entered when the type of work selected is 'Personal'.**

The **start postcode** has been populated from the postcode entered when you originally logged on – this can be overtyped on this page if required.

The **end postcode** is mandatory and should be the postcode of the furthest place you have travelled to on this date.

**Dial Card Fuel Amount and Dial Card Oil** – enter the gross amount spent as a monetary amount with no £ sign.

**Non DC Fuel amount** – this is for amounts spent on personal credit / debit cards or cash. Enter the gross amount spent as a monetary amount with no £ sign.

If you have a VAT receipt for your non-Dial Card fuel and/or oil, tick the appropriate **VAT receipt box**. The system will calculate the VAT for you and store it on the database.

When you have finished entering the data you require, click the **Submit** button. If you have made any errors or omissions of mandatory data, you will receive alert messages highlighting what these are. A red asterisk or error message will also appear alongside the field in error.

**Weekly Fuel input for week 22/07/2012-28/07/2012**

Day	Date	Type of Work	Vehicle Reg	Miles			Postcode		Dial	Fuel (£)
				Business	Personal	Total	Start	End		
Sunday	22/07/2012	Customer Visit	WP11EBV	50	20	70	MK7	WA5		50.00
Monday	23/07/2012	Customer Visit					MK7			
Tuesday	24/07/2012	Customer Visit	WP11EBV				MK7			
Wednesday	25/07/2012	Customer Visit	WP11EBV				MK7			
Thursday	26/07/2012	Customer Visit	WP11EBV				MK7			
Friday	27/07/2012	Customer Visit	WP11EBV				MK7			
Saturday	28/07/2012	Customer Visit	WP11EBV				MK7			

Submit

- Vehicle registration cannot be blank for Monday  
 - End postcode cannot be blank for Monday  
 - End postcode cannot be blank for Tuesday  
 - End postcode cannot be blank for Wednesday  
 - End postcode cannot be blank for Thursday  
 - End postcode cannot be blank for Friday  
 - End postcode cannot be blank for Saturday

OK

#### Example 9 – Weekly input validation errors

Correct the fields that are in error and click the Submit button.

If there are no errors or omissions, the system will create a claim for each date that you have entered values for and will return to the week select menu.

If you select that week again you will see that the days you entered date for are now 'greyed out' i.e. unavailable for input, but the data you put in is displayed for reference.

**DUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer [Log Out](#)

Add Weekly Claim

Home | Back

Surname: Engineer | Forenames: Bob | Employee No: 12068 | Job Grade: SE | Cost Centre: | Car Registration: WP11EBV | Report To: Robert Carnell

**Weekly Fuel input for week 22/07/2012-28/07/2012**

Day	Date	Type of Work	Vehicle Reg	Miles			Postcode		Dial Card		Non Dial Card	
				Business	Personal	Total	Start	End	Fuel (£)	Oil (£)	Fuel (£)	Oil (£)
Sunday	22/07/2012	Customer Visit	WP11EBV	50	20	70	MK7	WA5	50.00		20.00	<input checked="" type="checkbox"/> Vat
Monday	23/07/2012	Customer Visit	WP11EBV	100	0	100	MK7	SK12				<input type="checkbox"/> Vat
Tuesday	24/07/2012	Customer Visit	WP11EBV	215	12	227	MK7	M1	30.00	15.00		<input type="checkbox"/> Vat
Wednesday	25/07/2012	Customer Visit	WP11EBV				MK7					<input type="checkbox"/> Vat
Thursday	26/07/2012	Customer Visit	WP11EBV	80	20	100	MK7	NW16				<input type="checkbox"/> Vat
Friday	27/07/2012	Customer Visit	WP11EBV				MK7					<input type="checkbox"/> Vat
Saturday	28/07/2012	Personal	WP11EBV	0	100	100	MK7	CW2			50.00	<input type="checkbox"/> Vat

Submit

#### Example 10 – Weekly entry with some days entered

You can enter data into the available days, but **changes must be made through the specifically designed edit pages. See Editing a Fuel and Mileage Claim.**

## Making a Claim - Daily input

Select the '[Add New Claim](#)' or '[Input](#)' link from the Claim Summary to start a new claim or add another day's expenses to an existing claim. You will then see the Daily Claim Input Selection page:

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer [Log Out](#)

Create a Claim for Period Selected

[Home](#) | [Back](#)

Surname: **Engineer** Forenames: **Bob** Employee No: **12068** Job Grade: **SE** Cost Centre: **24021** Report To: **Robert Carnell**

Car Registration: **WP11EBV** Mileage for this claim

Claim for Period **Jun-Jul 2012**

Select Date:

Type of Work:

[Fuel and Mileage](#) [Allowances](#) [Miscellaneous](#) [Travel](#) [Meetings/In House](#) [Entertainment](#) [Service Materials](#)

[Rate per Mile](#)

Example 11 Daily Claim Input Selection page

### Screen elements

- Menu bar – you can use these links to navigate around the system. Use the Back option from any page to cancel any changes you have made without saving them.
- Employee data labels – these show the data currently loaded into the Expenses system from the CHRIS personnel system. If you think that these are not correct please contact your Manager or System Administrator.
- Input form fields and buttons – this is the area of the page where you can input your data and then perform some action depending on which button you click.

The page shown above is tailored for the specific employee, who is an **engineer grade**, so the Type of Work drop down menu has been defaulted to 'Customer Visit' and the 'Service Materials' button is visible.

As this user has a company vehicle (see Employee data labels) the Fuel and Mileage button is visible.

### Select the date

June 2012						
Mo	Tu	We	Th	Fr	Sa	Su
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

Click the calendar control to choose from available dates:

Note that dates on which no entries have yet been made are available to select – identified by the day number being underlined.

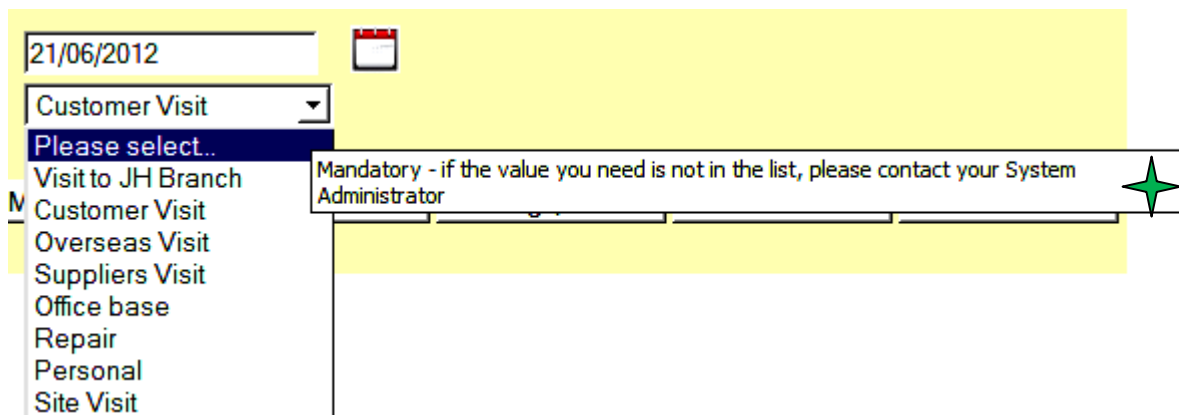
Only dates within the period can be selected.


No future dates will be available to select.

Days on which entries have already been made will be shown in **red**.

When you have selected a date it will appear in the box alongside the calendar.

Select the 'Type of work' from the drop down list:



 ***The text shown here is called a 'tooltip' and will appear to assist you if you hold your mouse over the input field or drop down list.***

Note that this is a mandatory field.

### **Making a Fuel and Mileage claim**

Once you have selected the date and type of work click the button 'Fuel and Mileage from the Daily Claim Input Selection page:

Use this page to enter fuel and mileage details for a company, pool or hire vehicle only.



**You will not see this option if you are an employee who does not have a vehicle**

The following page will be displayed:

## Add Claim Detail

[Home](#) | [Back](#)

Surname: **White** Forenames: **Robert** Employee No: **12068** Job Grade: **SE** Cost Centre: **24021** Car Registration: **WP11EBV** Report To: **Robert Carnell**

### Fuel allowance claim for 25/07/2012

Date of Claim: **25 July 2012**  
 Type of Work: **Visit to JH MK (MK7)**  
 Vehicle Reg: **WP11EBV** ☐ Pool/Hire Vehicle Start Mileage: **0**  
 Postcode: Start: **MK7** End:   
 Business Miles:   
 Personal Miles:   
 DialCard Fuel amount:   
 DialCard Oil:

#### NON DIAL CARD FUEL

Non DC Fuel amount:  **GBP** ☐ Vat Receipt  
 Vat on Non DialCard fuel:

#### NON DIAL CARD OIL

Non DC Oil amount:  **GBP** ☐ Vat Receipt  
 Vat on Non DialCard Oil:

**Submit**

Example 12 – Fuel and mileage daily claim page



### Fuel and mileage input fields

Use the TAB key after you have entered data otherwise the tick boxes and drop down menus may not work correctly.

The **date of claim** and **type of work** has been carried forward from your selection and are not editable on this page.

The **vehicle registration** has been defaulted to the company vehicle from the Employee label in this instance. If you have used a pool or hire vehicle on this day, then tick the **Pool/Hire Vehicle** check box and enter the registration of the pool or hire vehicle.

The **start mileage** of your company vehicle for the period can be entered or amended on this page. You will be able to change this when you submit the claim.

The **start postcode** has been populated from the postcode entered when you originally logged on – this can be overtyped on this page if required. **Not required if 'Type of Work' is Personal.**

The **end postcode** is mandatory and should be the postcode of the furthest place you have travelled to on this date. **Not required if 'Type of Work' is Personal.**

**Business miles** and **personal miles** – enter the business and private miles travelled for the day. These should be entered as whole numbers – NB Personal Miles are not required for Company Directors. **Business Miles not allowed if 'Type of Work' is Personal.**

**DialCardFuelAmount and DialCardOil** – enter the gross amount spent as a monetary amount with no £ sign.

**Non DC Fuel amount** – this is for amounts spent on personal credit / debit cards or cash. Enter the gross amount spent as a monetary amount with no £ sign.

GBP transactions: If you have a VAT receipt for your non-Dial Card fuel, tick the **VAT receipt box** and the system will calculate the VAT for you –

NON DIAL CARD FUEL		
Non DC Fuel amount:	<input type="text" value="50.00"/>	<input type="text" value="GBP"/> <input checked="" type="checkbox"/> Vat Receipt
Vat on Non DialCard fuel:	<input type="text" value="8.33"/>	
Exchange rate on currency:	<input type="text"/>	VAT on GBP amounts only where a VAT receipt can be provided

Non GBP transactions: If the Non Dial Card fuel has been paid for in Euros, select this from the **currency drop down box**.

If you select Euros or Other Currency, the system will reset the VAT receipt box and VAT values as these do not apply to foreign currency transactions.

NON DIAL CARD FUEL		
Non DC Fuel amount:	<input type="text" value="50.00"/>	<input type="text" value="Euros"/>
Vat on Non DialCard fuel:	<input type="text" value="0"/>	
Exchange rate on currency:	<input type="text" value="0.80420"/>	<input type="checkbox"/> Alternative Rate
Rate Source:	<input type="text" value="Bank"/>	This defaults to the most recent available bank rate – tick the Alternative Rate box if you have evidence of a different rate, then enter your rate here
Non DC fuel Converted amount:	<input type="text" value="40.21"/>	

For **Euro** transactions, the most recent exchange rate will appear in the **Exchange Rate** field as a default and the **Rate Source** will be set to 'Bank'.

If you have evidence of a different rate, as described in the Jungheinrich Expenses policy you can tick the **Alternative Rate** box. This will then allow you to type in your own exchange rate and **the Rate Source** will be set to 'User'.

NON DIAL CARD FUEL		
Non DC Fuel amount:	<input type="text" value="50.00"/>	<input type="text" value="Euros"/>
Vat on Non DialCard fuel:	<input type="text" value="0"/>	
Exchange rate on currency:	<input type="text" value="0.806"/>	<input checked="" type="checkbox"/> Alternative Rate
Rate Source:	<input type="text" value="User"/>	
Non DC fuel Converted amount:	<input type="text" value="40.30"/>	The system will set this value depending on the exchange rate used above

The exchange rate you enter is validated to be not 10% greater or less than the bank rate to avoid incorrect entries.

For **Other Currency** transactions you will be presented with a field in which to enter the name of the currency and the exchange rate:

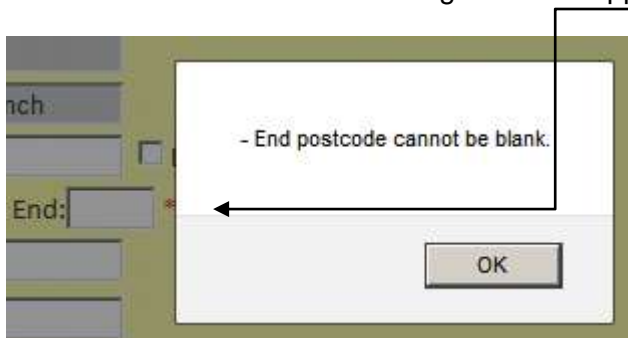
NON DIAL CARD FUEL	
Non DC Fuel amount:	<input type="text"/>
Vat on Non DialCard fuel:	<input type="text"/>
Currency:	<div>Other Currency ▼</div> <div> <div>GBP</div> <div>Euro</div> <div>Other Currency</div> </div>
Exchange rate on currency:	<input type="text"/>
Rate Source:	<input type="text"/>
Non DC fuel Converted amount:	<input type="text"/>

Select the currency from the list, the system will calculate the amount for you

The **Non Dial Card Fuel converted amount** is calculated by the system.

**Non Dial Card Oil** fields operate in the same manner as described for Non Dial Card Fuel.

When you have finished entering the data you require, click the **Submit** button. If you have made any errors or omissions in your data entry you will receive alert messages highlighting what these are. A red asterisk or error message will also appear alongside the field in error.



You will also receive a warning if you have not entered any data at all – if you have selected this page by mistake, click the Back button from the Menu bar to return to the previous page.

When you have corrected your errors, click the Submit button again and you will be returned to the Daily Claim Input Selection page.

Machines. Ideas. Solutions.

Logged in as Bob Engineer

### Create a Claim for Period Selected

Home | Back |

Surname: **White** | Forenames: **Robert** | Employee No: **12068** | Job Grade: **SE** | Cost Centre: **24021** | Report To: **Robert Carnell**

Car Registration: **WP11EBV** | Mileage for this claim **619**

#### Claim for Period Jul-Aug 2012

Select Date:

Type of Work: **Customer Visit**

[Fuel and Mileage](#) | 
 [Rate per Mile](#) | 
 [Allowances](#) | 
 [Miscellaneous](#) | 
 [Travel](#) | 
 [Meetings/In House](#) | 
 [Entertainment](#) | 
 [Service Materials](#)

	Date	Vehicle	Mileage	Rate per Mile	Allowance	Miscellaneous	Service Materials	Travel	InHouse	Entertainment	Type of Work
<a href="#">View/Edit</a>	2012-07-21	WP11EBV	22	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Personal
<a href="#">View/Edit</a>	2012-07-22	WP11EBV	70	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-23	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-24	WP11EBV	227	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-26	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-28	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Personal

This now shows a grid showing each day on which claim values have been entered.

A summary of the mileage for the company vehicle for this claim is shown in the labels at the top of the page.

## Making a 'Rate per Mile' claim

### Summary

Use this option to claim for business miles travelled if you have either used your own vehicle, or used your company vehicle and you do not have a company fuel card. The HMRC rates will be used from the Rates table.

### Add a Rate per Mile (RPM) claim to a day on which other expenses already exist:

To add the RPM to a day that already appears in the grid – click the link in the Rate per mile column. If no RPM claim has been entered for that day the link will be displayed as [RPM](#). Otherwise the total value of the RPM claim for that day will be highlighted as the link.

### Add a Rate per Mile (RPM) claim for another day:

From the Daily Claim Input Selection page, enter the date and type of work and click the 'Rate per Mile' button. This page will display different input fields and use different rates depending on your employment circumstances and what type of vehicle you use.

### Company vehicle user and No Fuel Card

The screenshot shows the 'Add Claim Detail' page for a Rate per Mile claim. At the top left is the Jungheinrich logo with the tagline 'Machines. Ideas. Solutions.'. At the top right, it says 'Logged in as Gill T'. Below the logo is a navigation bar with 'Home' and 'Back' links. A horizontal bar contains employee details: Surname: Tyler, Forenames: Gill, Employee No: 00365, Job Grade: S3, Cost Centre: 10982, and Car Registration: VU58ZKE. The main form area is titled 'Rate per Mile claim for 23/07/2012'. It contains several input fields: 'Date of Claim' (23 July 2012), 'Type of Work' (Visit to JH Branch), 'Postcode: Start' (WA7) and 'End' (empty), 'Vehicle Registration' (VU58ZKE), 'Vehicle Type' (Please select...), 'Claim Miles' (empty), and 'Claim Amount' (empty). There is a checkbox for 'Own Vehicle' which is unchecked. A 'Submit' button is at the bottom left of the form area.

### Example 13 - Company vehicle user and No Fuel Card

#### Rate per mile input fields – company car

The **date of claim** and **type of work** has been carried forward from your selection and are not editable on this page.

The **start postcode** has been populated from the postcode entered when you originally logged on – this can be overtyped on this page if required.

The **end postcode** is mandatory and should be the postcode of the furthest place you have travelled to on this date.

The **vehicle registration** will default to your company vehicle, but you can overtype this with another registration if you have used a pool or hire car.

If you have **not used your own vehicle** – select the **vehicle type** from the drop down menu. This is the table of rates issued by HMRC and determines how much your claim will be.



The rates are based on engine size and fuel type – take care to select the correct rate.

Vehicle Type:	Please select..
Claim Miles:	Please select..
Claim Amount:	1400cc or less - LPG
	1400cc or less - Petrol
	1401cc to 2000cc - LPG
	1401cc to 2000cc - Petrol
	Over 2000cc - LPG
	Over 2000cc - Petrol
	1600cc or less - Diesel
	1601cc to 2000cc - Diesel
	Over 2000cc - Diesel
<input type="button" value="Submit"/>	

#### Example 14 – Engine sizes for Rate per Mile fuel claim

**Claim miles** – enter the business miles travelled for the day. These should be entered as whole numbers.

**Claim Amount** - The system will calculate your claim amount based on the rate per mile for the vehicle type chosen.

**Own Vehicle checkbox** - If you have used your own vehicle, click this checkbox and the screen will alter to the view below:

<b>Rate per Mile claim for 23/07/2012</b>	
Date of Claim:	23 July 2012
Type of Work:	Visit to JH Branch
Postcode: Start:	WA7
End:	
Vehicle Registration:	<input type="text"/>
	<input checked="" type="checkbox"/> Own Vehicle
Reason for Using Own Vehicle:	<input type="text"/>
Claim Miles:	<input type="text"/>
Claim Amount:	<input type="text"/>
<input type="button" value="Submit"/>	

Complete the fields as described in Rate per Mile claim – own vehicle and click Submit.

## Company vehicle user and a Fuel Card

If you are a company vehicle user with a fuel card, you would normally make your claims via the Fuel and Mileage option, so that if you do select the 'Rate per Mile' from the Daily Claim Input Selection page, the system assumes that you want to enter a claim for using your own vehicle on the day selected. You will see the following screen:

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Henry Young

### Add Claim Detail

[Home](#) | [Back](#)

Surname: Young | Forenames: Henry | Employee No: 99999 | Job Grade: S0 | Cost Centre: 00000 | Car Registration: AB12CDE

**Own Vehicle claim for 23/06/2012**

Date of Claim: 23 June 2012

Type of Work: Suppliers Visit

Postcode: Start: mk7 End: mk11

Vehicle Registration: KU54KOJ

Reason for using own car: Co vehicle service

Claim Miles: 30

Claim Amount: 12.00

### Example 15 – Rate per mile, own vehicle claim

#### Rate per mile input fields – own vehicle

The **date of claim** and **type of work** has been carried forward from your selection and are not editable on this page.

The **start postcode** has been populated from the postcode entered when you originally logged on – this can be overtyped on this page if required.

The **end postcode** is mandatory and should be the postcode of the furthest place you have travelled to on this date.

The **vehicle registration** is mandatory and should be the registration mark of your own vehicle.

**Reason for using own car** is mandatory and should briefly describe why your own vehicle was used as agreed with your manager.

**Claim miles** – enter the business miles travelled for the day. These should be entered as whole numbers.

**Claim amount** - The system will calculate your claim amount based on the rates defined in the Jungheinrich Expenses policy.

## Making an Allowance Claim

### Summary

Unlike the expenses spreadsheet used formerly, the system will now handle multiple Allowance claims per day and will summarise the total for the day in the grid on the Daily Claim Input Selection page.

Select the claim you wish to use from the Claim Summary page and then from the Daily Claim Input Selection page:

### Add an allowance to a day on which other expenses already exist:

To add the Allowance to a day that already appears in the grid – click the link in the Allowance column. If there are no allowances on for that day the link will say '[Allowance](#)'. Otherwise the total value of allowance claimed for that day will be highlighted as the link.

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Create a Claim for Period Selected

Home | Back

Surname: Young Forenames: Henry Employee No: 99999 Job Grade: 50 Cost Centre: 00000 Report To: Mark Craigen

Car Registration: AB12CDE Mileage for this claim 100

Claim for Period Aug-Sep 2012

Select Date:

Type of Work: Please select

Fuel and Mileage Rate per Mile Allowances Miscellaneous Travel Meetings/In House Entertainment

	Date	Vehicle	Mileage	Rate per Mile	Allowance	Miscellaneous	Travel	InHouse	Entertainment	Type of Work
View/Edit	22/08/2012	AB12CDE	100	RPM	Allowances	Miscellaneous	Travel	InHouse	Entertainment	Customer Visit
View/Edit	23/08/2012	AB12CDE	0	RPM	5.00	Miscellaneous	Travel	InHouse	Entertainment	Suppliers Visit


Example 16 – 22<sup>nd</sup> has no Allowances claimed, 23<sup>rd</sup> has Allowances to value of £5.00

### Add an allowance for another day

Click the calendar control to choose from available dates and select the 'Type of work' from the drop down menu.

Click the 'Allowances' button.

Whichever method you have used you will see the following page:


Logged in as Henry Young

## Add Claim Detail

[Home](#) | [Back](#)

Surname: **Young** Forenames: **Henry** Employee No: **99999** Job Grade: **S0** Cost Centre: **00000** Car Registration: **AB12CDE** Repo

### Allowances for Period Aug-Sep 2012

Date of Claim:   
Type of Work:   
Allowance:   
Amount:

Add another allowance ☐ Yes ☒ No

Expense	Amount
Breakfast	5.00

Example 17 23<sup>rd</sup> has Allowances to value of £5.00 shown in grid bottom left

### Claim an allowance – input fields

The **date of claim** and **type of work** has been carried forward from your selection and are not editable on this page.

**Allowance** drop down menu – please select the relevant allowance from the list e.g.

Please select...  
Daily Lunch Allowance  
Overnight - receipted  
Overnight - unreceipted

Please note that this list will vary depending on whether you have claimed other allowances already for the selected day. In this example, because the 'Breakfast' allowance has already been claimed for, it no longer appears in the list.

When you select a value a box will appear on the screen advising you of the Expense policy relating to the allowance e.g.

### Allowances for Period Jul-Aug 2012

Applies to employees away from place of work > 4 hours and no lunch provided (Excluding FS Engineers and Field based staff). Fixed rate £2.50 per day

Example 19 - Daily lunch Allowance selected, policy shown in box to right

**Amount** – the amount is either user input or calculated by the system depending on the Allowance type:

**Breakfast** – user input up to maximum value

**Daily lunch** – fixed rate

**Overnight receipted** – user input up to maximum value. This allowance can be in non-GBP currency. Select the currency from the drop down list.

Allowances for Period Jul-Aug 2012

Date of Claim: 22 July 2012

Type of Work: Customer Visit

Allowance: Overnight - receipted

Amount: GBP

Name of Hotel: GBP

Other Currency

Max amount £18.00 for evening meal and out of pocket expenses paid against a VAT receipt. Enter the location of the overnight stay.

Select the currency from the list, the system will calculate the amount for you

Add another allowance ☐ Yes ☒ No

**Example 19 - overnight receipted allowance selected, currency drop down highlighted**

For **Euro** transactions, the most recent exchange rate will appear in the **Exchange Rate** field as a default and the **Rate Source** will be set to 'Bank'.

If you have evidence of a different rate, as described in the Jungheinrich Expenses policy you can tick the **Alternative Rate** box. This will then allow you to type in your own exchange rate and **the Rate Source** will be set to 'User'.

For **Other Currency** transactions you will be presented with a field in which to enter the name of the currency and the exchange rate.

The system will calculate the **Converted Amount** from the Amount and Exchange Rate entered.

**Add another allowance option** - if you wish to add another allowance for the same day click the 'Yes' radio button before clicking Submit. You will be returned to this page to add another allowance.

**Click the Submit button.**

If you have missed out any data or made any input errors you will be prompted to correct them at this point.

## Making a Claim for Miscellaneous Expenses

### Summary

Unlike the expenses spreadsheet used formerly, the system will now handle multiple Miscellaneous type claims per day and will summarise the total for the day in the grid on the Daily Claim Input Selection page.

Use this option for sundry business expenditure not covered elsewhere in the system. The only fixed rate item that gets recorded here is a Car Wash, applicable only to Service Engineers.

Select the claim you wish to use from the Claim Summary page and then from the Daily Claim Input Selection page:

### Add a miscellaneous claim to a day on which other expenses already exist:

To add the Miscellaneous claim to a day that already appears in the grid – click the link in the ‘Miscellaneous column’. If there are no Miscellaneous claims for that day the link will say ‘[Miscellaneous](#)’. Otherwise the total value of miscellaneous items claimed for that day will be highlighted as the link.

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Gill Tyler Log Out

Create a Claim for Period Selected

Home | Back |

Surname: Tyler Forenames: Gill Employee No: 00365 Job Grade: S3 Cost Centre: 10982 Report To: Lucile Langrish-Smith

Car Registration: VU58ZKE Mileage for this claim

Claim for Period Jun-Jul 2012

Select Date:

Type of Work:

Fuel and Mileage Allowances Miscellaneous Travel Meetings/In House Entertainment Rate per Mile

	Date	Vehicle	Mileage	Rate per Mile	Allowance	Miscellaneous	Travel	InHouse	Entertainment
<a href="#">View/Edit</a>	21/06/2012	VU58ZKE	0		127.00	<a href="#">Miscellaneous</a>	<a href="#">Travel</a>	<a href="#">InHouse</a>	<a href="#">Entertainment</a>

**Example 18 – 21/6/2012 has Allowances to value £127 but no entries to date for Miscellaneous items**

### Add an allowance for another day

Click the calendar control to choose from available dates and select the ‘Type of work’ from the drop down menu.

Click the ‘Miscellaneous button.

Whichever method you have used you will see the following page:

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Henry Young

### Add Claim Detail

[Home](#) | [Back](#)

Surname: **Young** Forenames: **Henry** Employee No: **99999** Job Grade: **S0** Cost Centre: **00000** Car Registration: **AB12CDE** Repo

#### Miscellaneous Expenses for Period Aug-Sep 2012

Date of Claim: 22 August 2012

Type of Work: Customer Visit

Type of Expense: Please select...

Amount:  GBP

Non VAT Amount:

Vat:  ☐ Vat Receipt

Add another expense ☐ Yes ☒ No

Example 19 – Miscellaneous expense input page

#### Claim a Miscellaneous expense– input fields

The **date of claim** and **type of work** has been carried forward from your selection and are not editable on this page.

**Type of expense** – if you are a Service Engineer you will be able to select the relevant Car Wash option.

Please select...

Please select...

Other

Car Wash

Car Wash - Corsa Van

For all other items, select 'Other' and enter a brief description in the '**Description**' field that appears when 'Other' is selected.

**Amount** – the amount field is user input. Enter the gross value. The Car Wash options have a maximum amount from the Rates table applied to the validation.

**Non VAT Amount** - if your receipt covers a mixture of items subject to and not subject to VAT, enter the Non VAT amount in this field.

**GBP transactions:** If you have a VAT receipt, tick the **VAT receipt box** and the system will calculate the VAT for you, based on the gross amount less any Non VAT amount.

Miscellaneous Expenses for Period Jul-Aug 2012			
Date of Claim:	22 July 2012		
Type of Work:	Customer Visit		
Type of Expense:	Other		
Description:	Office equipment		
Amount:	100.00	GBP	
Non VAT Amount:	10.00		
Vat:	15.00	<input checked="" type="checkbox"/> Vat Receipt	
Add another expense <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="Submit"/>			

**Example 20 – VAT split from gross amount entered less Non VAT amount**

**Non GBP transactions:** If the miscellaneous item has been paid for in Euros or another currency, select this from the **currency drop down box**.

If you select Euros or other currency, the system will reset the VAT receipt box and VAT values as these do not apply to foreign currency transactions.

For **Euro** transactions ,the most recent exchange rate will appear in the **Exchange Rate** field as a default and the **Rate Source** will be set to 'Bank'.

Miscellaneous Expenses for Period Jul-Aug 2012			
Date of Claim:	25 July 2012		
Type of Work:	Customer Visit		
Type of Expense:	Other		
Description:	Fuses		
Amount:	1.50	Euros	
Vat:	0		
Exchange rate:	0.77850	<input type="checkbox"/> Alternative Rate	
Rate Source:	Bank		
Converted amount:	1.17		
Add another expense <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="Submit"/>			

**Example 21 – Currency changed to Euros, VAT reset and Bank rate used**

If you have evidence of a different rate, as described in the Jungheinrich Expenses policy you can tick the **Alternative Rate** box. This will then allow you to type in your own exchange rate and **the Rate Source** will be set to 'User'.

For **Other Currency** transactions you will be presented with a field in which to enter the name of the currency and the exchange rate.

The system will calculate the **Converted Amount** from the Amount and Exchange Rate entered.

Miscellaneous Expenses for Period Jul-Aug 2012	
Date of Claim:	22 July 2012
Type of Work:	Customer Visit
Type of Expense:	Other
Description:	Fuses
Amount:	50.00
Non VAT Amount:	
Vat:	
Currency:	RUB
Exchange rate:	0.0198
Rate Source:	User
Converted amount:	0.99
Add another expense <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="Submit"/>	

**Example 22 – Currency changed to Other Currency, currency name and exchange rate entered by User**

**Add another expense** option – click 'Yes' if you wish to add another Miscellaneous item for the selected day.

Click the **Submit** button.

If you have missed out any data or made any input errors you will be prompted to correct them at this point.

## Making a Claim for Service Materials - Engineers and ASMs only

### Summary

Unlike the expenses spreadsheet used formerly, the system will now handle multiple Service Materials type claims per day and will summarise the total for the day in the grid on the Daily Claim Input Selection page.

Select the claim you wish to use from the Claim Summary page and then from the Daily Claim Input Selection page:

### Add a Service Materials claim to a day on which other expenses already exist:

To add the Service materials claim to a day that already appears in the grid – click the link in the 'Service Materials column'. If there are no Service Materials claims for that day the link will say '[S.Mats](#)'. Otherwise the total value of Service Materials items claimed for that day will be highlighted as the link.

	Date	Vehicle	Mileage	Rate per Mile	Allowance	Miscellaneous	Service Materials	Travel	InHouse	Entertainment	Type of Work
<a href="#">View/Edit</a>	2012-07-21	WP11EBV	22	RPM	38.92	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Personal
<a href="#">View/Edit</a>	2012-07-22	WP11EBV	70	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-23	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-24	WP11EBV	227	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-26	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-28	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Personal


**Example 23 – No service materials entered for any day of this period**

### Add a Service Materials claim for another day

Click the calendar control to choose from available dates and select the 'Type of work' from the drop down menu.

Click the 'Service Materials' button.

Whichever method you have used you will see the following page:


Logged in as Bob Engineer

## Add Claim Detail

[Home](#) | [Back](#)

Surname: **White** | Forenames: **Robert** | Employee No: **12068** | Job Grade: **SE** | Cost Centre: **24021** | Car Registration: **WP11EBV** | Rep

### Service Materials for Period Jul-Aug 2012

Date of Claim:   
Type of Work:   
Description:   
Amount:  GBP  
Vat:  ☐ Vat Receipt  
Exchange rate:   
Rate Source:   
Converted amount:

Add another expense ☐ Yes ☒ No

Example 24 – Service Materials input page

### Claim a Service Materials expense– input fields

The **date of claim** and **type of work** has been carried forward from your selection and are not editable on this page.

Enter a brief **description** of the item purchased.

**Amount** – the amount field is user input. Enter the gross value.

**GBP transactions:** If you have a VAT receipt for your non-Dial Card fuel, tick the **VAT receipt box** and the system will calculate the VAT for you.

**Non GBP transactions:** If the Service Materials item has been paid for in Euros or another currency, select this from the **currency drop down box**.

If you select Euros or other currency, the system will reset the VAT receipt box and VAT values as these do not apply to foreign currency transactions.

For **Euro** transactions ,the most recent exchange rate will appear in the **Exchange Rate** field as a default and the **Rate Source** will be set to 'Bank'.

Service Materials for Period Jul-Aug 2012			
Date of Claim:	23 July 2012		
Type of Work:	Customer Visit		
Description:	Batteries		
Amount:	20.00	Euro ▼	
Vat:			
Exchange rate:	0.77980	<input type="checkbox"/> Alternative Rate	
Rate Source:	Bank		
Converted amount:	15.60		
Add another expense <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="Submit"/>			

#### Example 25 – Currency changed to Euros, VAT reset and Bank rate used

If you have evidence of a different rate, as described in the Jungheinrich Expenses policy you can tick the **Alternative Rate** box. This will then allow you to type in your own exchange rate and **the Rate Source** will be set to 'User'.

For **Other Currency** transactions you will be presented with a field in which to enter the name of the currency and the exchange rate. These fields are mandatory.

The system will calculate the **Converted Amount** from the Amount and Exchange Rate entered.

**Add another expense** option – click 'Yes' if you wish to add another Service Materials item for the selected day.

Click the **Submit** button. If you have missed out any data or made any input errors you will be prompted to correct them at this point.

Service Materials for Period Jul-Aug 2012			
Date of Claim:	23 July 2012		
Type of Work:	Customer Visit		
Description:	Batteries		
Amount:	20.00	Other Currency	
Vat:			
Currency:		*	
Exchange rate:		*	
Rate Source:	User		
Converted amount:			
Add another expense <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="Submit"/>			

- You must enter a currency  
- You must enter an Exchange rate

#### Example268 – Currency changed to Other currency but no details entered

## Making a Claim for Travel Expenses

### Summary

Unlike the expenses spreadsheet used formerly, the system will now handle multiple Travel Expenses claims per day and will summarise the total for the day in the grid on the Daily Claim Input Selection page.

Select the claim you wish to use from the Claim Summary page and then from the Daily Claim Input Selection page:

### Add a Travel expense claim to a day on which other expenses already exist:

To add the Travel expense claim to a day that already appears in the grid – click the link in the 'Travel expense column'. If there are no Travel expense claims for that day the link will say [Travel](#). Otherwise the total value of Travel expense items claimed for that day will be highlighted as the link.

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer

Create a Claim for Period Selected

Home | Back

Surname: White | Forenames: Robert | Employee No: 12068 | Job Grade: SE | Cost Centre: 24021 | Report To: Robert Carnell

Car Registration: WP11EBV | Mileage for this claim 619

Claim for Period Jul-Aug 2012

Select Date:

Type of Work: Customer Visit

Fuel and Mileage | Rate per Mile | Allowances | Miscellaneous | Travel | Meetings/In House | Entertainment | Service Materials

	Date	Vehicle	Mileage	Rate per Mile	Allowance	Miscellaneous	Service Materials	Travel	InHouse	Entertainment	Type of Work
<a href="#">View/Edit</a>	2012-07-21	WP11EBV	22	RPM	38.92	Miscellaneous	S.Mats	<a href="#">Travel</a>	InHouse	Entertainment	Personal
<a href="#">View/Edit</a>	2012-07-22	WP11EBV	70	RPM	Allowances	Miscellaneous	S.Mats	<a href="#">Travel</a>	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-23	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	<a href="#">Travel</a>	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-24	WP11EBV	227	RPM	Allowances	Miscellaneous	S.Mats	<a href="#">Travel</a>	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-26	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	<a href="#">Travel</a>	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-28	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	<a href="#">Travel</a>	InHouse	Entertainment	Personal

Example 279 – No travel expenses entered for any day of this period

### Add a Travel Expense claim for another day

Click the calendar control to choose from available dates and select the 'Type of work' from the drop down menu.

Click the 'Travel' button.

Whichever method you have used you will see the following page:

#### Example 280 – Travel Expense input page

#### Claim a Travel expense– input fields

The **date of claim** and **type of work** has been carried forward from your selection and are not editable on this page.

**Detail type** - select the type of travel expense from the drop down menu:

If you select '**Other**' a field will be displayed for you to enter the details - this is a mandatory field.

**Amount** – the amount field is user input. Enter the gross value.

**GBP transactions:** If you have a VAT receipt for your non-Dial Card fuel, tick the **VAT receipt box** and the system will calculate the VAT for you.

**Non GBP transactions:** If the Travel item has been paid for in Euros or another currency, select this from the **currency drop down box**.

If you select Euros or other currency, the system will reset the VAT receipt box and VAT values as these do not apply to foreign currency transactions.

For **Euro** transactions ,the most recent exchange rate will appear in the **Exchange Rate** field as a default and the **Rate Source** will be set to 'Bank'.

If you have evidence of a different rate, as described in the Jungheinrich Expenses policy you can tick the **Alternative Rate** box. This will then allow you to type in your own exchange rate and **the Rate Source** will be set to 'User'.

For **Other Currency** transactions you will be presented with a field in which to enter the name of the currency and the exchange rate. These fields are mandatory.

The system will calculate the **Converted Amount** from the Amount and Exchange Rate entered.

**Add another expense** option – click 'Yes' if you wish to add another Travel item for the selected day.

Click the **Submit** button.

If you have missed out any data or made any input errors you will be prompted to correct them at this point.

## Making a Claim for In House Meeting/Entertainment Expenses

### Summary

Unlike the expenses spreadsheet used formerly, the system will now handle multiple In House expenses claims per day and will summarise the total for the day in the grid on the Daily Claim Input Selection page.

Select the claim you wish to use from the Claim Summary page and then from the Daily Claim Input Selection page:

### Add an In-house expense claim to a day on which other expenses already exist:

To add the In-house expense claim to a day that already appears in the grid – click the link in the 'InHouse' column. If there are no In-house expense claims for that day the link will say [InHouse](#). Otherwise the total value of In-house expense items claimed for that day will be highlighted as the link.

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer

Create a Claim for Period Selected

Home | Back

Surname: White | Forenames: Robert | Employee No: 12068 | Job Grade: SE | Cost Centre: 24021 | Report To: Robert Carnell

Car Registration: WP11EBV | Mileage for this claim 619

Claim for Period Jul-Aug 2012

Select Date:

Type of Work: Customer Visit

Fuel and Mileage | Rate per Mile | Allowances | Miscellaneous | Travel | Meetings/In House | Entertainment | Service Materials

	Date	Vehicle	Mileage	Rate per Mile	Allowance	Miscellaneous	Service Materials	Travel	InHouse	Entertainment	Type of Work
<a href="#">View/Edit</a>	2012-07-21	WP11EBV	22	RPM	38.92	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Personal
<a href="#">View/Edit</a>	2012-07-22	WP11EBV	70	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-23	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-24	WP11EBV	227	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-26	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-28	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Personal


Example 31 – No in-house expenses entered for any day of this period

### Add an In-house Expense claim for another day

Click the calendar control to choose from available dates and select the 'Type of work' from the drop down menu.

Click the 'Meetings/InHouse' button.

Whichever method you have used you will see the following page:


Machines. Ideas. Solutions.

Logged in as Bob Engineer

## Add Claim Detail

[Home](#) | [Back](#)

Surname: **White** | Forenames: **Robert** | Employee No: **12068** | Job Grade: **SE** | Cost Centre: **24021** | Car Registration: **WP11EBV** | Rep

### Offsite Meetings/In House Entertainment for Period Jul-Aug 2012

Date of Claim:   
Type of Work:   
Description:   
Amount:    
Non VAT Amount:   
Vat:   
Service Charge:

Add JH Employees ☐ Yes ☒ No

Example 32 – Meetings/In House entertainment input page

### Claim a Meeting/In-House expense- input fields

The **date of claim** and **type of work** has been carried forward from your selection and are not editable on this page.

Enter a brief **Description** of the meeting or event.

**Amount** – the amount field is user input. Enter the gross value.

**Non VAT Amount** - if your receipt covers a mixture of items subject to and not subject to VAT, enter the total Non VAT amount in this field.

**GBP transactions** - the system will calculate the VAT for you, based on the gross amount less any Non VAT amount and Service Charge.

Offsite Meetings/In House Entertainment for Period Jul-Aug 2012		
Date of Claim:	24 July 2012	
Type of Work:	Customer Visit	
Description:	Lunch	
Amount:	50.00	GBP ▼
Non VAT Amount:	5.00	
Vat:	6.67	
Service Charge:	5.00	
Add JH Employees <input type="radio"/> Yes <input checked="" type="radio"/> No <input type="button" value="Submit"/>		

**Example 33 – VAT split from gross amount entered, less Non VAT amount and Service Charge**

**Non GBP transactions:** If the In-House item has been paid for in Euros or another currency, select this from the **currency drop down box**.

If you select Euros or other currency, the system will reset the VAT value as this does not apply to foreign currency transactions.

For **Euro** transactions ,the most recent exchange rate will appear in the **Exchange Rate** field as a default and the **Rate Source** will be set to 'Bank'.

If you have evidence of a different rate, as described in the Jungheinrich Expenses policy you can tick the **Alternative Rate** box. This will then allow you to type in your own exchange rate and **the Rate Source** will be set to 'User'.

For **Other Currency** transactions you will be presented with a field in which to enter the name of the currency and the exchange rate.

The system will calculate the **Converted Amount** from the Amount and Exchange Rate entered.

**Add JH Employees** - if other Jungheinrich employees attended the meeting or in-house event, select the 'Yes' radio button before clicking the 'Submit' button.

The following page will be displayed if you have selected 'Yes'.

## Adding Employees to a Meeting/In-House claim

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer

Add Employees or Team to Event

Home | Back |

Surname: White Forenames: Robert Employee No: 12068 Job Grade: SE Cost Centre: 24021 Car Registration: WP11EBV Report To: Robert Carnell

**In House Entertainment add JH Employees for Period Jul-Aug 2012**

Date of Claim: 24 July 2012

Employee Name: Aaron Saunders Filter by Surname: Aaron Saunders - It Support Analyst

Add Employee

Team Name: ---Select---

Add Team

### Example 33 – Adding an employee or Team to and In-House event

Select the name of the employee from the drop down list.

To shorten the list of employees you can filter it by surname, simply type the surname in the **Filter by Surname** field and press TAB.

The name you select will appear in the **Employee Name** field, click 'Add Employee' to attach the Employee details to this claim.

Once added the name will appear in a grid on the lower part of the page with a [Delete](#) link if you have selected the wrong person.

**In House Entertainment add JH Employees for Period Jul-Aug 2012**

Date of Claim: 24 July 2012

Employee Name: Aaron Saunders Filter by Surname: Aaron Saunders - It Support Analyst

Add Employee

Team Name: ---Select---

Add Team

	Employee Name	Work Area	Cost Centre
<a href="#">Delete</a>	Gareth Jones	Site Service Engineer	23022

### Example 34 – Gareth Jones added to In House event for 24/7/2012

To add a Team, select the **Team Name** from the drop down list and then select the relevant department from the second drop down list:

**In House Entertainment add JH Employees for F**

Date of Claim: 24 July 2012

Employee Name: Aaron Saunders Filter by Surname: Aaron

Add Employee

Team Name: Sales Department: ---Select---

Add Team

	Employee Name	Work Area
<a href="#">Delete</a>	Gareth Jones	Site Service Eng

**Example 35 – 'Sales' team selected, valid departments shown in Department drop down**

Click the **Add Team** button to add your selection.

Once added the team will appear in a grid on the lower part of the page with a [Delete](#) link if you have selected the wrong team

When you have finished adding all your names, click the Back option from the menu bar to return to the Daily Claim Input Selection page.

## Making a Claim for Customer Entertainment Expenses

### Summary

Unlike the expenses spreadsheet used formerly, the system will now handle multiple Customer Entertainment expenses claims per day and will summarise the total for the day in the grid on the Daily Claim Input Selection page.

Select the claim you wish to use from the Claim Summary page and then from the Daily Claim Input Selection page:

### Add a Customer Entertainment expense claim to a day on which other expenses already exist:

To add the Customer Entertainment expense claim to a day that already appears in the grid – click the link in the 'Entertainment' column. If there are no Entertainment expense claims for that day the link will say [Entertainment](#). Otherwise the total value of Entertainment expense items claimed for that day will be highlighted as the link.

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer

Create a Claim for Period Selected

Home | Back

Surname: White | Forenames: Robert | Employee No: 12068 | Job Grade: SE | Cost Centre: 24021 | Report To: Robert Carnell

Car Registration: WP11EBV | Mileage for this claim 619

Claim for Period Jul-Aug 2012

Select Date:

Type of Work: Customer Visit

Fuel and Mileage | Rate per Mile | Allowances | Miscellaneous | Travel | Meetings/In House | Entertainment | Service Materials

	Date	Vehicle	Mileage	Rate per Mile	Allowance	Miscellaneous	Service Materials	Travel	InHouse	Entertainment	Type of Work
<a href="#">View/Edit</a>	2012-07-21	WP11EBV	22	RPM	38.92	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Personal
<a href="#">View/Edit</a>	2012-07-22	WP11EBV	70	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-23	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-24	WP11EBV	227	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-26	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-28	WP11EBV	100	RPM	Allowances	Miscellaneous	S.Mats	Travel	InHouse	Entertainment	Personal

### Example 36 – No in-house expenses entered for any day of this period

### Add an Entertainment Expense claim for another day

Click the calendar control to choose from available dates and select the 'Type of work' from the drop down menu.

Click the 'Entertainment' button.

Whichever method you have used you will see the following page:

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer

### Add Claim Detail

Home | Back

Surname: **White** Forenames: **Robert** Employee No: **12068** Job Grade: **SE** Cost Centre: **24021** Car Registration: **WP11EBV** Rep

**Customer Entertainment for Period Jul-Aug 2012**

Date of Claim: 22 July 2012  
 Type of Work: Customer Visit  
 Customer: Please select...  
 Event:  
 No. of Customers:  
 Amount: GBP

Add JH Employees ☐ Yes ☒ No

Example 37 Customer entertainment input page

#### Claim a Customer Entertainment expense- input fields

The **date of claim** and **type of work** has been carried forward from your selection and are not editable on this page.

**Customer** - select the Customer name from the drop down menu - if not present select 'Other' and enter the Customer name in the **Customer** field provided.

**Event** - Enter a brief description of the meeting or event.

**No of Customers**- enter the number of customers present.

**Amount** – the amount field is user input. Enter the gross value.

**Non GBP transactions:** If the Customer Entertainment has been paid for in Euros or another currency, select this from the **currency drop down box**.

For **Euro** transactions ,the most recent exchange rate will appear in the **Exchange Rate** field as a default and the **Rate Source** will be set to 'Bank'.

If you have evidence of a different rate, as described in the Jungheinrich Expenses policy you can tick the **Alternative Rate** box. This will then allow you to type in your own exchange rate and **the Rate Source** will be set to 'User'.

For **Other Currency** transactions you will be presented with a field in which to enter the name of the currency and the exchange rate.

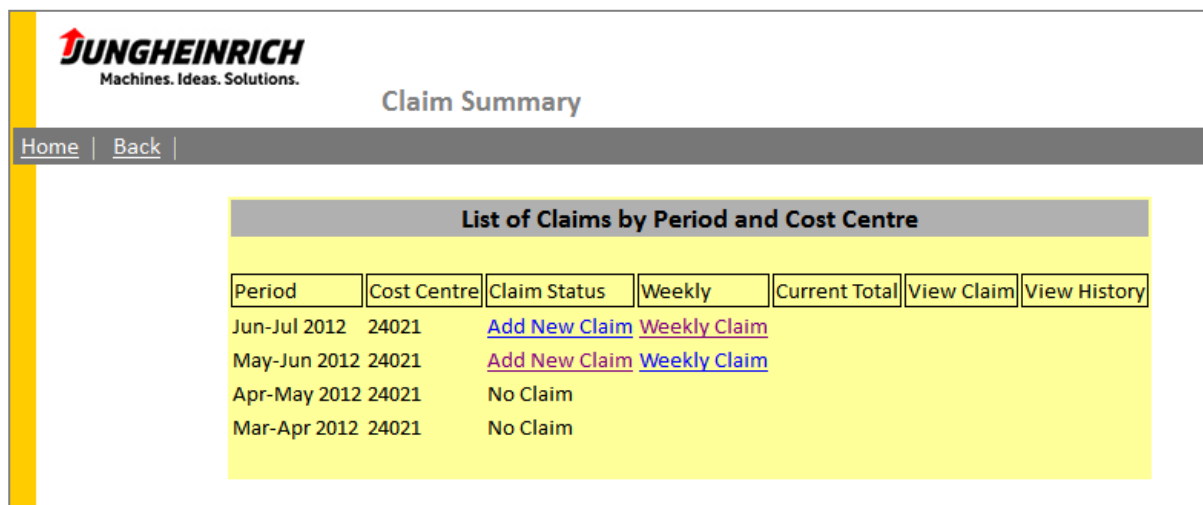
The system will calculate the **Converted Amount** from the Amount and Exchange Rate entered.

**Add JH Employees** - if other Jungheinrich employees attended the event follow the procedures described in section [Adding Employees to a Meeting/In-House claim](#).

## Reviewing your progress – the Claim Summary Page

As you add new claims or add and change details of existing claims, you can see a summary view on the Claim Summary page.

This is how it appears before any claims have been made:

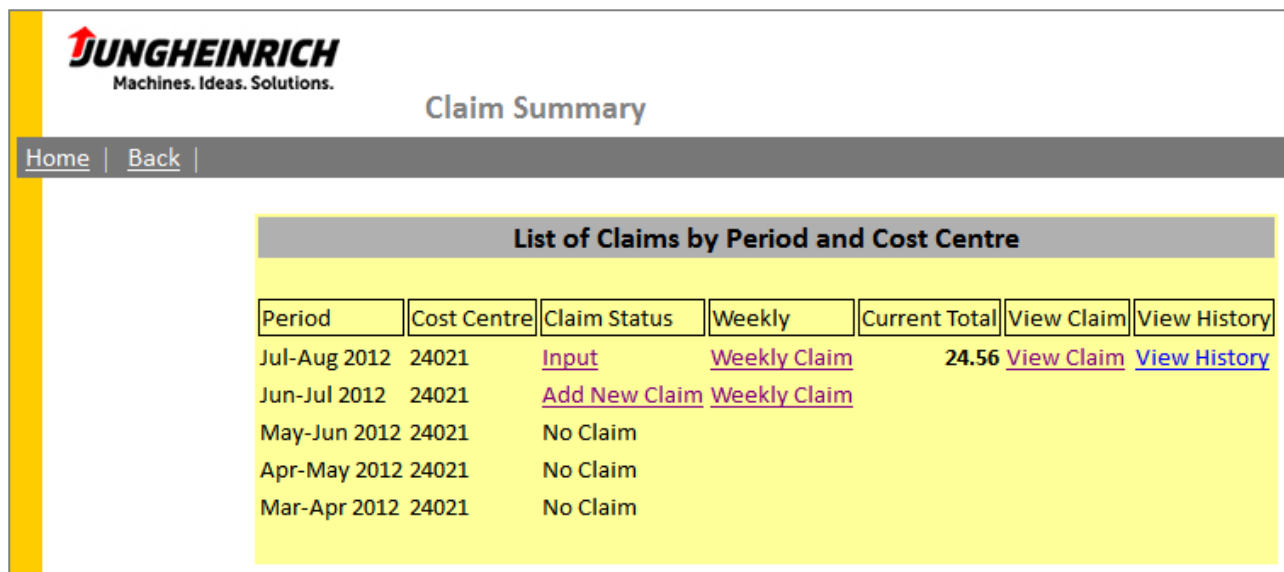


The screenshot shows the Jungheinrich logo and the title 'Claim Summary'. Below the title is a navigation bar with 'Home' and 'Back' links. The main content area is titled 'List of Claims by Period and Cost Centre' and contains a table with the following data:

Period	Cost Centre	Claim Status	Weekly	Current Total	View Claim	View History
Jun-Jul 2012	24021	<a href="#">Add New Claim</a>	<a href="#">Weekly Claim</a>			
May-Jun 2012	24021	<a href="#">Add New Claim</a>	<a href="#">Weekly Claim</a>			
Apr-May 2012	24021	No Claim				
Mar-Apr 2012	24021	No Claim				

Example 38 Claim summary page before any claims have been entered

Once a claim has been started, the link in the Claim Status column will change to [Input](#), the current claim total will be displayed and links to [View Claim](#) and [View History](#) will appear.



The screenshot shows the same Jungheinrich logo and title 'Claim Summary'. The navigation bar and table structure are identical to the previous example, but the data is updated to reflect a claim started for Jul-Aug 2012:

Period	Cost Centre	Claim Status	Weekly	Current Total	View Claim	View History
Jul-Aug 2012	24021	<a href="#">Input</a>	<a href="#">Weekly Claim</a>	24.56	<a href="#">View Claim</a>	<a href="#">View History</a>
Jun-Jul 2012	24021	<a href="#">Add New Claim</a>	<a href="#">Weekly Claim</a>			
May-Jun 2012	24021	No Claim				
Apr-May 2012	24021	No Claim				
Mar-Apr 2012	24021	No Claim				

Example 39 Claim summary page - claim started for Jul-Aug 2012

### Claim summary – links

[Input](#) – use this link to add details to your claim for this period. This link will take you to the Daily Claim Input Selection page where you will see a grid of all your current input and be able to edit values or add more detail.



You can only add to or edit a claim whilst the status is '**Input**' or if it has been rejected by your Manager or the Finance department.

[Weekly Claim](#) - use this link to go to the 'Weekly Claim – week select' page – if you want to enter your fuel and mileage on weekly basis.

[View Claim](#) – use this link to see a read-only summary of your claim. This is also the page you would go to when you are ready to submit your claim to your Manager for approval.

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer

View Selected Claim

Home | Back

Surname: White Forenames: Robert Employee No: 12068 Job Grade: SE Cost Centre: 24021 Car Registration: WP11EBV Report To: Robert Carnell

**Claim Summary for Period Jul-Aug 2012 Status is Input**

Date	Area Worked	Vehicle	Business Miles	Personal Miles	DC Fuel	Non DC Fuel	Non DC Fuel VAT	DC Oil	Non DC Oil	Non DC Oil VAT	Daily Allowance	Service	Travel	Misc	Vat Other	In House	Entertaining	Casual Mileage
21/07/2012	Personal	WP11EBV		22		0			0		38.92							
22/07/2012	Customer Visit	WP11EBV	50	20	50.00	20.00	3.33		0									
23/07/2012	Customer Visit	WP11EBV	100			0			0									
24/07/2012	Customer Visit	WP11EBV	215	12	30.00	0		15.00	0							39.06		
26/07/2012	Customer Visit	WP11EBV	80	20		0			0									
28/07/2012	Personal	WP11EBV		100		50.00	8.33		0									
<b>Totals:</b>			<b>445</b>	<b>174</b>	<b>80.00</b>	<b>70.00</b>	<b>11.66</b>	<b>15.00</b>	<b>0</b>	<b>0</b>	<b>38.92</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>39.06</b>	<b>0</b>	<b>0</b>

Submit Claim Edit Before Submission

Example 40 View entire claim for Jul-Aug 2012

[View History](#) – use this link to see the progress of your claim through the system. At the input stage there will not be much to see but as your claim is approved/rejected/paid these key dates will be visible here along with any notes that your Manager or Finance have put on for your information.

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

View Claim History

Home | Back

Surname: White Forenames: Robert Employee No: 12068 Job Grade: SE Cost Centre: 24021 Car Registration: WP11EBV Report To: Robert Carnell

Date	Claim Ref	Action	Notes	Updated by
05/09/2012 16:31:55	20120712068C01	SubmissionReminder	Automated email sent	System
23/07/2012 10:10:15	20120712068C01	Input	Claim added to expenses database	Bob Engineer

Example 41 View claim history, claim input and email reminder to submit sent by automatic system process

## Editing your Claim

Select the claim you wish to edit from the Claim Summary page and then from the Daily Claim Input Selection page click the [View/Edit](#) link in the left hand column of the grid that corresponds to the day that you wish to edit:

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer

Create a Claim for Period Selected

Home | Back

Surname: White Forenames: Robert Employee No: 12068 Job Grade: SE Cost Centre: 24021 Report To: Robert Carnell

Car Registration: WP11EBV Mileage for this claim 519

Claim for Period Jul-Aug 2012

Select Date:

Type of Work: Customer Visit

Fuel and Mileage Rate per Mile Allowances Miscellaneous Travel Meetings/In House Entertainment Service Materials

	Date	Vehicle	Mileage	Rate per Mile	Allowance	Miscellaneous	Service Materials	Travel	InHouse	Entertainment	Type of Work
<a href="#">View/Edit</a>	2012-07-21	WP11EBV	22	RPM	38.92	Miscellaneous	5 Mats	Travel	InHouse	Entertainment	Personal
<a href="#">View/Edit</a>	2012-07-22	WP11EBV	70	RPM	Allowances	Miscellaneous	5 Mats	5.00	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-23	WP11EBV	100	RPM	Allowances	5.45	5 Mats	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-24	WP11EBV	227	RPM	Allowances	Miscellaneous	50.00	Travel	39.09	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-26	WP11EBV	100	RPM	Allowances	Miscellaneous	5 Mats	Travel	InHouse	150.00	Customer Visit
<a href="#">View/Edit</a>	2012-07-28	KU54KD	100	6.00	Allowances	Miscellaneous	5 Mats	Travel	InHouse	Entertainment	Personal

Example 42 Daily Claim Input selection page showing days entered and View/Edit link

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer

View all Claim Entries for a Date

Home | Back

Surname: White Forenames: Robert Employee No: 12068 Job Grade: SE Cost Centre: 24021 Car Registration: WP11EBV Report To: Robert Carnell

**Fuel and Mileage claim - 24/07/2012**

Fuel	Date	Area Worked	Business Miles	Personal Miles	DC Fuel	Non DC Fuel	DC Oil	Non DC Oil	Casual Reg	Casual Miles	Casual Amount
<a href="#">Edit</a>	24/07/2012	Customer Visit	215	12	30.00		15.00				


**Non Fuel Expenses - 24/07/2012**

	Allowance Type	Description	Amount	Currency	Amount GBP	VAT
<a href="#">Edit</a>	InHouseMeet_Ent	Lunch	50.00	Euro	39.06	
<a href="#">Edit</a>	ServiceMaterials	Battery charger	50.00	GBP		8.33

Example 43 View claim entries for a selected date

- ★ The fuel and mileage element for the day selected is always displayed in the top grid as there is only one fuel claim allowed per day by the system. The system will take you to the correct page depending on the fuel entry - either fuel and mileage, or Rate per Mile.
- ★ Non fuel expenses for the day selected are displayed in the lower grid.
- ★ Click the [Edit](#) link in the left hand column to change values for the item selected.

## Editing Fuel and Mileage



Logged in as Bob Engineer

Edit Fuel Element of Claim for date shown

[Home](#) | [Back](#)

Surname: **White** | Forenames: **Robert** | Employee No: **12068** | Job Grade: **SE** | Cost Centre: **24021** | Car Registration: **WP11EBV** | Report To: **Robert**

**Fuel allowance claim for 22/07/2012**

Date of Claim: 22/07/2012

Type of Work: Visit to JH MK (MK7)

Vehicle Reg: WP11EBV ☐ Pool/Hire Vehicle Start Mileage: 0

Postcode: Start: MK7 End: WA5

Business Miles: 50

Personal Miles: 20

DialCard Fuel amount: 50.00

DialCard Oil:

NON DIAL CARD FUEL

Non DC Fuel amount: 20.00  GBP  ☒ Vat Receipt

Vat on Non DialCard fuel: 3.33

Exchange rate on currency:

Rate Source:

Non DC fuel Converted amount:

NON DIAL CARD OIL

Non DC Oil amount:  GBP  ☐ Vat Receipt


Vat on Non DialCard Oil:

Example 44 Fuel and Mileage edit page for 22/07/2012, company vehicle user with Dial Card

The ***Date of claim and Type of Work*** fields are not editable on this page.

All other fields can be changed as required. Click ***Update*** to save your changes.

## Editing Rate per Mile claim



Logged in as Henry Young

### Edit Casual Mileage for Date Shown

[Home](#) | [Back](#)

Surname: **Young** | Forenames: **Henry** | Employee No: **99999** | Job Grade: **S0** | Cost Centre: **00000** | Report To: **Mark Craigen**

**Own Vehicle claim for 06/08/2012**

Date of Claim: 06/08/2012

Type of Work: Customer Visit

Postcode: Start: SK12 End: SK1

Vehicle Registration: k114xpb

Reason for using own car: Co car in for repair

Casual Miles: 12

Casual Amount: 4.80


Update

Example 45 Rate per Mile edit page for 06/08/2012, company vehicle user using Own Vehicle

The ***Date of claim and Type of Work*** fields are not editable on this page.

All other fields can be changed as required. Click ***Update*** to save your changes.

## Editing Allowance



Machines. Ideas. Solutions.

Edit Allowance for Date Shown

[Home](#) | [Back](#)

Surname: WhiteForenames: RobertEmployee No: 12068Job Grade: SECost Centre: 24021

Allowances for Bob Engineer 21/07/2012

Date of Claim:21/07/2012

Type of Work:Personal

Allowance:Overnight - receipted

Amount:50.00Euro

Name of Hotel:Campanile Paris

Exchange rate:0.77835Alternative Rate

Rate Source:Bank

Converted amount:38.92

Update


Remove

Example 46 Editing Overnight - receipted allowance for 21/07/2012

The **Date of claim**, **Type of Work** and **Allowance** fields are not editable on this page, if you have put on the wrong allowance for the day, please use the **Remove** button.

All other fields can be changed as required. Click **Update** to save your changes.

## Editing Miscellaneous



Logged in as Bob Engineer

### Edit Miscellaneous element of Claim for date shown

[Home](#) | [Back](#)

Surname: WhiteForenames: RobertEmployee No: 12068Job Grade: SECost Centre: 24021Car Registration: WP11EBVRep

#### Miscellaneous Expenses for Bob Engineer 23/07/2012

Date of Claim:	23/07/2012		
Type of Work:	Customer Visit		
Description:	Nuts and bolts		
Amount:	5.45	GBP	▼
Non VAT Amount:			
Vat:	0.91	<input checked="" type="checkbox"/> Vat Receipt	

UpdateRemove


### Example 47 Editing Miscellaneous item for 23/07/2012

The ***Date of claim and Type of Work*** fields are not editable on this page.

Make any changes that are necessary and then click ***Update***.

If required, you can click the ***Remove*** button to delete this item from your claim.

## Editing Travel



Logged in as Bob Engineer

Edit Travel element of Claim for date shown

[Home](#) | [Back](#)

Surname: WhiteForenames: RobertEmployee No: 12068Job Grade: SECost Centre: 24021Car Registration: WP11EBVRepd

Travel Allowances for Period Jul-Aug 2012

Date of Claim:22/07/2012

Type of Work:Visit to JH MK (MK7)

Detail Type:Toll

Amount:5.00GBP

Vat on Travel:0.83☒ Vat Receipt

Update


Remove

Example 48 Editing Travel item for 22/07/2012

The **Date of claim**, **Type of Work** and **Detail Type** fields are not editable on this page, if you have put on the wrong travel item for the day, please use the **Remove** button.

All other fields can be changed as required. Click **Update** to save your changes.

If required, you can click the **Remove** button to delete this item from your claim.



**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer

### Edit InHouse Element of Claim for date shown

[Home](#) | [Back](#)

Surname: **White** | Forenames: **Robert** | Employee No: **12068** | Job Grade: **SE** | Cost Centre: **24021** | Car Registration: **WP11EBV** | Report To: **Rob**

**Offsite Meetings/In House Entertainment for Period Jul-Aug 2012**

Date of Claim:   
 Type of Work:   
 Description:   
 Amount:    
 Non VAT Amount:   
 Vat:   
 Service Charge:   
 Exchange rate on currency:  ☒ Alternative Rate  
 Rate Source:   
 Converted amount:

Add JH Employees ☐ Yes ☒ No

	Employee Name	Cost Centre
<a href="#">Delete</a>	Gareth Jones	23022

	Team	Department
<a href="#">Delete</a>	Central Functions	Financial Services

**Example 49 Editing In-House item for 24/07/2012 - one employee and one Team associated with claim event**

The **Date of claim and Type of Work** fields are not editable on this page.


All other fields can be changed as required. Click **Update** to save your changes.

The grids on the lower part of the screen, display any Employees or Teams associated with this claim item. Use the [Delete](#) link in the left hand column if you want to remove one or more from this claim item.

To add additional Teams or Employees or to add them on to an In-House item, select the 'Yes' radio button alongside **Add JH Employees** and click the **Update** button. Follow the procedures described in section [Adding Employees to a Meeting/In-House claim](#).

If required, you can click the **Remove** button to delete this item from your claim.

## Editing Customer Entertainment



Logged in as Bob Engineer

### Edit Customer Entertaining element for date shown

[Home](#) | [Back](#)

Surname: White	Forenames: Robert	Employee No: 12068	Job Grade: SE	Cost Centre: 24021	Car Registration: WP11EBV	Rep:
----------------	-------------------	--------------------	---------------	--------------------	---------------------------	------

**Customer Entertainment for Period Jul-Aug 2012**

Date of Claim:26/07/2012

Type of Work:Customer Visit

Customer:GoodProspect

Event:Lunch

No. of Customers2

Amount:150.00

GBP

Add JH Employees ☐ Yes ☒ No 

Update Remove

There are no employees on this claim item

There are no teams on this claim item

**Example 50 Editing Customer Entertaining item for 26/07/2012 -no employees or Teams associated with claim event**


The **Date of claim and Type of Work** fields are not editable on this page.

All other fields can be changed as required. Click **Update** to save your changes.

The grids on the lower part of the screen, display any Employees or Teams associated with this claim item.

To add Teams or Employees to a Customer Entertainment item, select the 'Yes' radio button alongside **Add JH Employees** and click the **Update** button. Follow the procedures described in section [Adding Employees to a Meeting/In-House claim](#).

If required, you can click the **Remove** button to delete this item from your claim.

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Edit Claim Detail

[Home](#) | [Back](#)

Surname: **White**Forenames: **Robert**Employee No: **12068**Job Grade: **SE**Cost Centre: **24021**

**Service Materials for Bob Engineer 24/07/2012**

Date of Claim:24/07/2012

Type of Work:Customer Visit

Description:Battery charger

Amount:50.00GBP

Vat:8.33☒ Vat Receipt

Update

Remove

Example 51 Editing Service Materials claim for 24/07/2012

The ***Date of claim and Type of Work*** fields are not editable.

Make any changes that are necessary and then click ***Update***.

If required you can click the ***Remove*** button to delete this item from your claim.

## Changing the 'Type of Work' for a day

On the Daily Claim Input Selection page click the link in the 'Type of Work' column on the right of the grid for the day that you wish to make the change for.

	Date	Vehicle	Mileage	Rate per Mile	Allowance	Miscellaneous	Service Materials	Travel	InHouse	Entertainment	Type of Work
<a href="#">View/Edit</a>	2012-07-21	WP11EBV	22	RPM	38.92	Miscellaneous	5.00	Travel	InHouse	Entertainment	Personal
<a href="#">View/Edit</a>	2012-07-22	WP11EBV	70	RPM	Allowances	Miscellaneous	5.00	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-23	WP11EBV	100	RPM	Allowances	5.45	5.00	Travel	InHouse	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-24	WP11EBV	227	RPM	Allowances	Miscellaneous	50.00	Travel	39.06	Entertainment	Customer Visit
<a href="#">View/Edit</a>	2012-07-26	WP11EBV	100	RPM	Allowances	Miscellaneous	5.00	Travel	InHouse	150.00	Customer Visit
<a href="#">View/Edit</a>	2012-07-28	KU54KD	100	6.00	Allowances	Miscellaneous	5.00	Travel	InHouse	Entertainment	Personal

Example 52 Selecting Type of Work from Grid for a date in order to change it

Date of Claim: 22/07/2012

Type of Work: Customer Visit

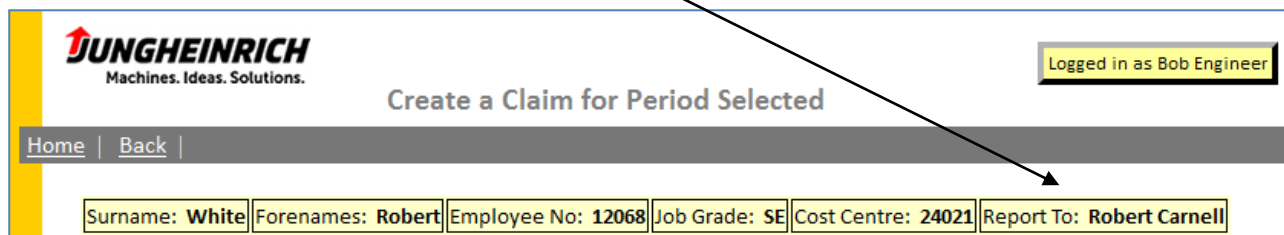
Update

- Customer Visit
- Please select...
- Customer Visit
- Overseas Visit
- Suppliers Visit
- Repair
- Personal
- Site Visit
- Off-site Training
- Normal Office Base
- Visit to JH Warrington (WA5)
- Visit to JH MK (MK7)
- Visit to JH Bristol (BS32)
- Visit to JH Birmingham (B24)
- Visit to JH Risley (WA3)
- Visit to JH Sheffield (S9)
- Visit to JH Cumbernauld (G68)
- Prospecting
- Employee visit/Team meeting

Choose the 'Type of Work' from the drop down list and click **Update**.

## Submitting a claim for approval

At the end of a claim period you must submit your claim to your manager for approval. Your normal line manager is shown at the top of the page:



**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Logged in as Bob Engineer

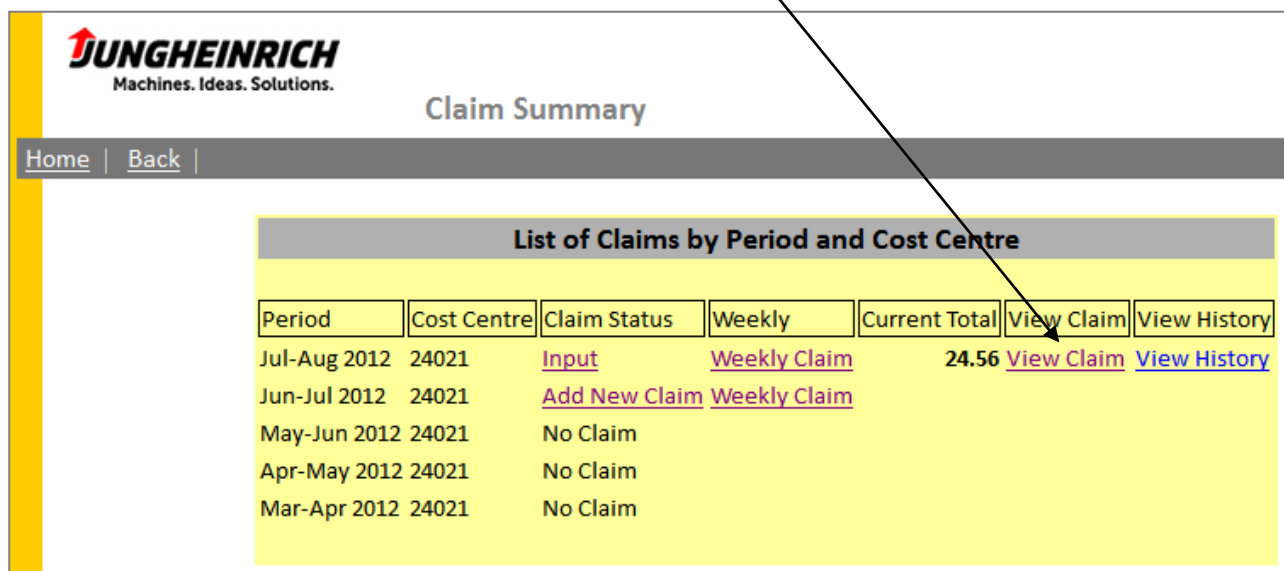
Create a Claim for Period Selected

Home | Back |

Surname: White Forenames: Robert Employee No: 12068 Job Grade: SE Cost Centre: 24021 Report To: Robert Carnell

If your manager is going to be away at the end of a claim period, he/she will have appointed an Alternative Approver and your claim will be sent to them.

When you are ready to submit your claim, select the [View Claim](#) link from the Claim Summary page:



**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Claim Summary

Home | Back |

List of Claims by Period and Cost Centre

Period	Cost Centre	Claim Status	Weekly	Current Total	View Claim	View History
Jul-Aug 2012	24021	Input	Weekly Claim	24.56	<a href="#">View Claim</a>	<a href="#">View History</a>
Jun-Jul 2012	24021	<a href="#">Add New Claim</a>	Weekly Claim			
May-Jun 2012	24021	No Claim				
Apr-May 2012	24021	No Claim				
Mar-Apr 2012	24021	No Claim				

This will show you a summary view of all your entries for the period selected.



Claim Summary for Period Jul-Aug 2012 Status is Input

Date	Area Worked	Vehicle	Business Miles	Personal Miles	DC Fuel	Non DC Fuel	Non DC Fuel VAT	DC Oil	Non DC Oil	Non DC Oil VAT	Daily Allowance	Service	Travel	Misc	Vat Other	In House	Entertaining	Casual Mileage
21/07/2012	Personal	WP11EBV		22		0			0		38.92							
22/07/2012	Visit to JH MK (MK7)	WP11EBV50	20		50.00	20.00	3.33		0				5.00		0.83			
23/07/2012	Customer Visit	WP11EBV100				0			0						5.45	8.41	45.00	200.00
24/07/2012	Customer Visit	WP11EBV213	12		30.00	0		15.00	0			50.00			8.33	39.06		
26/07/2012	Customer Visit	WP11EBV80	20			0			0								150.00	
28/07/2012	Personal	KU5400J	100			50.00	8.33											6.00
30/07/2012	Customer Visit	WP11EBV123			80.00	0			0									
31/07/2012	Customer Visit	WP11EBV85				0			0									
01/08/2012	Customer Visit	WP11EBV62				0			0									
02/08/2012	Customer Visit	WP11EBV54				0			0									
03/08/2012	Customer Visit	WP11EBV33				0		10.00	1.67									
13/08/2012	Customer Visit	WP11EBV100				0			0									
14/08/2012	Customer Visit	WP11EBV150				0			0									
15/08/2012	Customer Visit	WP11EBV92				0			0									
16/08/2012	Customer Visit	WP11EBV84			82.33	0			0									
17/08/2012	Customer Visit	WP11EBV22				0			0									
Totals:			1250	174	242.33	70.00	11.66	15.00	10.00	1.67	38.92	50.00	5.00	5.45	17.57	84.06	350.00	6.00

Submit Claim Edit Before Submission

If you notice an omission or change you need to make before submission, use the **Edit Before Submission** button to go back and change your claim.

When you are happy with your entries, click the **Submit Claim** button.

**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Submit Claim

Home | Back |

Surname: White Forenames: Robert Employee No: 12068 Job Grade: SE Cost Centre: 24021 Report To: Robert Carnell

Submit Claim for Period Jul-Aug 2012

Receipt Code: 20120712068C01

Total Value of Claim: 581.27

Other Vehicle(s) Used: KU54KOJ

WP11EBV Start mileage: 51165

WP11EBV End mileage: 52489

Claim Approver: Robert Carnell

Number of Receipts:

Notes:

Submit Claim Cancel

Example 53 Claim submission page showing receipt code for Finance envelope

### Submit Claim - input fields

**Receipt Code** - This is the code to put on the envelope provided to send your receipts to the Finance department.

**Total Value of claim** - this is the amount that you will be getting paid or paying back.

**Other Vehicles Used:** - if you have a company vehicle and have used hire, pool or your own vehicle during the claim period, the other registration numbers will appear here.

**Company vehicle Start Mileage** - the mileage of your company vehicle at the start of the period. If this is not correct you can correct it here before you submit the claim.

**Company vehicle End Mileage** - the mileage of your company vehicle at the end of the period. This is calculated by the system based on the start mileage that you input plus the number of miles travelled during the period.

**Claim approver** - the name of the employee who will be approving the claim. This will normally be your line manager as defined in the CHRIS personnel system, but may be an Alternative Approver appointed by your Manager or by the Expenses system administrator.

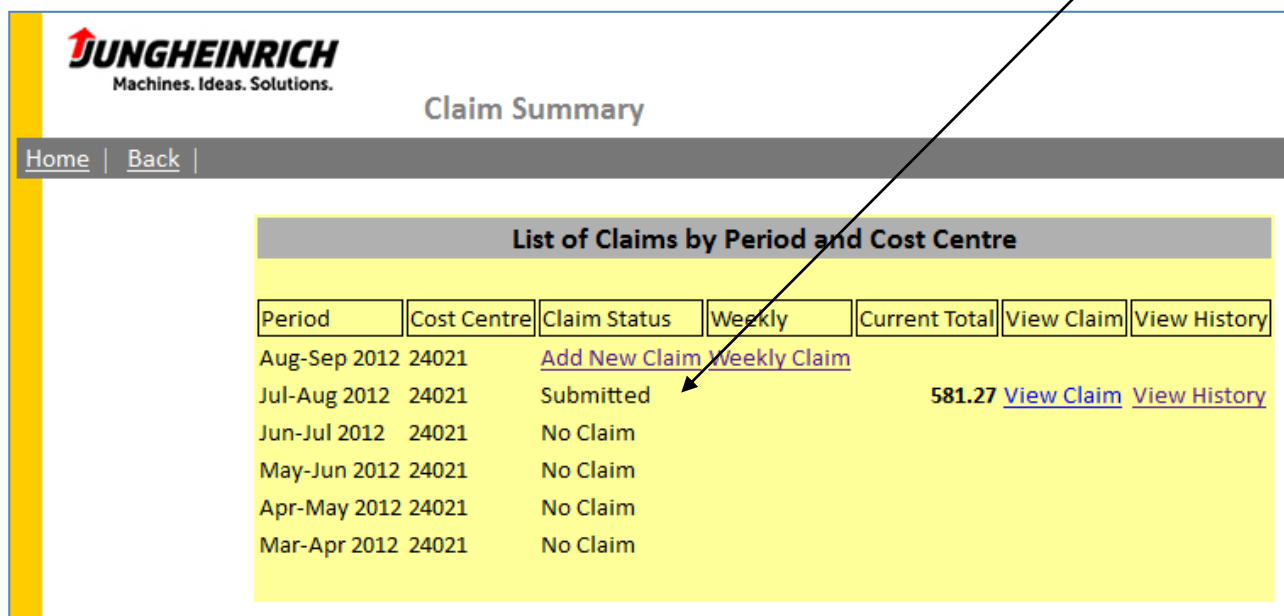
**Number of receipts** - the number of receipts that you are sending to the Finance Department for this claim.

**Notes** - you can type in here any information that you think will be useful to your Manager and Finance when they are approving and verifying your claim.

When you have completed the data entry, click the **Submit Claim button**.

If you do not want to proceed with submission, click the **Cancel button**.

You can still view your submitted Claim and its history but you cannot make any changes to it. On the claim summary screen, the status will now show as 'Submitted'.



**JUNGHEINRICH**  
Machines. Ideas. Solutions.

### Claim Summary

[Home](#) | [Back](#)

List of Claims by Period and Cost Centre						
Period	Cost Centre	Claim Status	Weekly	Current Total	View Claim	View History
Aug-Sep 2012	24021	<a href="#">Add New Claim</a> <a href="#">Weekly Claim</a>				
Jul-Aug 2012	24021	Submitted		581.27	<a href="#">View Claim</a>	<a href="#">View History</a>
Jun-Jul 2012	24021	No Claim				
May-Jun 2012	24021	No Claim				
Apr-May 2012	24021	No Claim				
Mar-Apr 2012	24021	No Claim				

Select the View History link to view the details of submission:

Date	Claim Ref	Action	Notes	Updated by
17/09/2012 14:20:05	20120712068C01	Claim Submitted	Had permission from Manager to use own vehicle.	Bob Engineer
05/09/2012 16:31:55	20120712068C01	SubmissionReminder	Automated email sent	System
23/07/2012 10:10:15	20120712068C01	Input	Claim added to expenses database	Bob Engineer



This history is visible to your manager and the Finance department.

If you have not submitted your claim by 3 working days after the end of the period, the system will send you an email reminder.

## Claim Rejected by Manager

If your claim has been rejected by your manager, you will have received an email to inform you of this and when you look at your Claim Summary, you will see that the claim status is now 'Manager Reject'.

List of Claims by Period and Cost Centre						
Period	Cost Centre	Claim Status	Weekly	Current Total	View Claim	View History
Aug-Sep 2012	24021	<a href="#">Add New Claim</a> <a href="#">Weekly Claim</a>				
Jul-Aug 2012	24021	<a href="#">ManagerReject</a> <a href="#">Weekly Claim</a>		581.27	<a href="#">View Claim</a>	<a href="#">View History</a>
Jun-Jul 2012	24021	No Claim				
May-Jun 2012	24021	No Claim				
Apr-May 2012	24021	No Claim				
Mar-Apr 2012	24021	No Claim				

If you look at the Claim History you will see any notes that your Manager has put on the claim explaining why it has been rejected. These notes will also be in the email.

Date	Claim Ref	Action	Notes	Updated by
17/09/2012 14:30:23	20120712068C01	ManagerRejected	Nuts and bolts should be under Service Materials 23/7	Robert Carnell
17/09/2012 14:20:05	20120712068C01	Claim Submitted	Had permission from Manager to use own vehicle.	Bob Engineer
05/09/2012 16:31:55	20120712068C01	SubmissionReminder	Automated email sent	System
23/07/2012 10:10:15	20120712068C01	Input	Claim added to expenses database	Bob Engineer

You can now edit the claim by clicking the [ManagerReject](#) link and make any changes required.

Once you have made any corrections submit your claim as described above.

Date	Claim Ref	Action	Notes	Updated by
17/09/2012 14:42:09	20120712068C01	Claim Submitted	Nuts and bolts moved to Service Materials as requested	Bob Engineer
17/09/2012 14:30:23	20120712068C01	ManagerRejected	Nuts and bolts should be under Service Materials 23/7	Robert Carnell
17/09/2012 14:20:05	20120712068C01	Claim Submitted	Had permission from Manager to use own vehicle.	Bob Engineer
05/09/2012 16:31:55	20120712068C01	SubmissionReminder	Automated email sent	System
23/07/2012 10:10:15	20120712068C01	Input	Claim added to expenses database	Bob Engineer

When your manager has approved your claim the status will change to '[Manager Approve](#)' and you can check the date using the [View History](#) link. You will also receive an automated email.

### List of Claims by Period and Cost Centre

Period	Cost Centre	Claim Status	Weekly	Current Total	View Claim	View History
Aug-Sep 2012	24021	<a href="#">Add New Claim</a>	<a href="#">Weekly Claim</a>			
Jul-Aug 2012	24021	ManagerApprove		554.77	<a href="#">View Claim</a>	<a href="#">View History</a>
Jun-Jul 2012	24021	No Claim				
May-Jun 2012	24021	No Claim				
Apr-May 2012	24021	No Claim				
Mar-Apr 2012	24021	No Claim				

Date	Claim Ref	Action	Notes	Updated by
17/09/2012 14:57:02	20120712068C01	ManagerApprove	Approved by Manager	Robert Carnell
17/09/2012 14:42:09	20120712068C01	Claim Submitted	Nuts and bolts moved to Service Materials as requested	Bob Engineer
17/09/2012 14:30:23	20120712068C01	ManagerRejected	Nuts and bolts should be under Service Materials 23/7	Robert Carnell
17/09/2012 14:20:05	20120712068C01	Claim Submitted	Had permission from Manager to use own vehicle.	Bob Engineer
05/09/2012 16:31:55	20120712068C01	SubmissionReminder	Automated email sent	System
23/07/2012 10:10:15	20120712068C01	Input	Claim added to expenses database	Bob Engineer

The claim will now be visible to the Finance Department so that they can verify your claim against the receipts you provide.

## Claim rejected by Finance

If your claim is rejected by the Finance Department, the status will change to [Finance Reject](#)

List of Claims by Period and Cost Centre						
Period	Cost Centre	Claim Status	Weekly	Current Total	View Claim	View History
Aug-Sep 2012	24021	<a href="#">Input</a>	<a href="#">Weekly Claim</a>	0.00	<a href="#">View Claim</a>	<a href="#">View History</a>
Jul-Aug 2012	24021	FinanceReject		554.77	<a href="#">View Rejected Claim</a>	<a href="#">View History</a>
Jun-Jul 2012	24021	No Claim				
May-Jun 2012	24021	No Claim				
Apr-May 2012	24021	No Claim				
Mar-Apr 2012	24021	No Claim				

Use the View Reject Claim link to view the rejected line(s).

Claim Summary from Period Jul-Aug 2012																	
Edit	Date	Area Worked	Business Miles	Personal Miles	DC Fuel	Non DC Fuel	Non DC Fuel VAT	DC Oil	Non DC Oil	Daily Allowance	Service	Travel	Misc	Vat Other	In House	Entertaining	Casual Mileage
	21/07/2012	Personal		22						38.92							
<a href="#">Edit</a>	22/07/2012	Visit to JH MK (MK7)	50	20	50.00	20.00	3.33					5.00		0.83			
	23/07/2012	Customer Visit	100								5.45			8.41	45.00	200.00	
	24/07/2012	Customer Visit	215	12	30.00			15.00			50.00			8.33	39.06		
	26/07/2012	Customer Visit	80	20												150.00	
	28/07/2012	Personal															6.00
	30/07/2012	Customer Visit	123		80.00												
	31/07/2012	Customer Visit	85														
	01/08/2012	Customer Visit	62														
	02/08/2012	Customer Visit	54														
	03/08/2012	Customer Visit	33						10.00								
	13/08/2012	Customer Visit	100														
	14/08/2012	Customer Visit	150														
	15/08/2012	Customer Visit	92														
	16/08/2012	Customer Visit	84		82.33												
	17/08/2012	Customer Visit	22														
Submit Claim																	

### Example 54 Claim rejected by Finance for 22/7/2012, only this day is editable

The day(s)' s entries rejected by Finance will appear in red with an [Edit](#) link in the left hand column.

You can only change highlighted lines at this stage.

Details of why the claim has been rejected will be sent to you in an email and can also be viewed using the [View History](#) link.

Date	Claim Ref	Action	Notes	Updated by
17/09/2012 15:11:27	20120712068C01	FinanceRejected	No VAT receipt for fuel on 22/7	Paul Newman
17/09/2012 15:10:14	20120712068C01	FinanceReject	Rejected by Finance	Paul Newman
17/09/2012 14:57:02	20120712068C01	ManagerApprove	Approved by Manager	Robert Carnell
17/09/2012 14:42:09	20120712068C01	Claim Submitted	Nuts and bolts moved to Service Materials as requested	Bob Engineer
17/09/2012 14:30:23	20120712068C01	ManagerRejected	Nuts and bolts should be under Service Materials 23/7	Robert Carnell
17/09/2012 14:20:05	20120712068C01	Claim Submitted	Had permission from Manager to use own vehicle.	Bob Engineer
05/09/2012 16:31:55	20120712068C01	SubmissionReminder	Automated email sent	System
23/07/2012 10:10:15	20120712068C01	Input	Claim added to expenses database	Bob Engineer

Click the Edit link to make your changes, then click the **Submit Claim** button.

Your claim will then be available directly to the Finance Department.

Date	Claim Ref	Action	Notes	Updated by
18/09/2012 09:06:52	20120712068C01	ManagerApprove	Resubmitted to Finance	Bob Engineer
18/09/2012 09:06:43	20120712068C01	FinanceReject	Rejected by Finance	Paul Newman
17/09/2012 15:11:27	20120712068C01	FinanceRejected	No VAT receipt for fuel on 22/7	Paul Newman
17/09/2012 15:10:14	20120712068C01	FinanceReject	Rejected by Finance	Paul Newman
17/09/2012 14:57:02	20120712068C01	ManagerApprove	Approved by Manager	Robert Carnell
17/09/2012 14:42:09	20120712068C01	Claim Submitted	Nuts and bolts moved to Service Materials as requested	Bob Engineer
17/09/2012 14:30:23	20120712068C01	ManagerRejected	Nuts and bolts should be under Service Materials 23/7	Robert Carnell
17/09/2012 14:20:05	20120712068C01	Claim Submitted	Had permission from Manager to use own vehicle.	Bob Engineer
05/09/2012 16:31:55	20120712068C01	SubmissionReminder	Automated email sent	System
23/07/2012 10:10:15	20120712068C01	Input	Claim added to expenses database	Bob Engineer

### Claim approved by Finance

When Finance have approved your Claim, the status will change to 'Finance Approve' and you will receive an email confirming this.

List of Claims by Period and Cost Centre						
Period	Cost Centre	Claim Status	Weekly	Current Total	View Claim	View History
Aug-Sep 2012	24021	<a href="#">Input</a>	<a href="#">Weekly Claim</a>	20.00	<a href="#">View Claim</a>	<a href="#">View History</a>
Jul-Aug 2012	24021	FinanceApprove		554.77	<a href="#">View Claim</a>	<a href="#">View History</a>
Jun-Jul 2012	24021	No Claim				
May-Jun 2012	24021	No Claim				
Apr-May 2012	24021	No Claim				
Mar-Apr 2012	24021	No Claim				


You can also view the approval details in the Claim History:

Date	Claim Ref	Action	Notes	Updated by
18/09/2012 09:23:19	20120712068C01	FinanceApprove	Approved by Finance	Paul Newman
18/09/2012 09:06:52	20120712068C01	ManagerApprove	Resubmitted to Finance	Bob Engineer
18/09/2012 09:06:43	20120712068C01	FinanceReject	Rejected by Finance	Paul Newman
17/09/2012 15:11:27	20120712068C01	FinanceRejected	No VAT receipt for fuel on 22/7	Paul Newman
17/09/2012 15:10:14	20120712068C01	FinanceReject	Rejected by Finance	Paul Newman
17/09/2012 14:57:02	20120712068C01	ManagerApprove	Approved by Manager	Robert Carnell
17/09/2012 14:42:09	20120712068C01	Claim Submitted	Nuts and bolts moved to Service Materials as requested	Bob Engineer
17/09/2012 14:30:23	20120712068C01	ManagerRejected	Nuts and bolts should be under Service Materials 23/7	Robert Carnell
17/09/2012 14:20:05	20120712068C01	Claim Submitted	Had permission from Manager to use own vehicle.	Bob Engineer
05/09/2012 16:31:55	20120712068C01	SubmissionReminder	Automated email sent	System
23/07/2012 10:10:15	20120712068C01	Input	Claim added to expenses database	Bob Engineer

The claim will be processed in the next Payroll run following the Finance approval date.

## Manager - View submitted claims

When you log in to the system as a Manager, you will see a grid showing you any claims awaiting your approval.



Logged in as Robert Carnell
 Log Out


Expenses System

Home | My Claims | Appoint Alt Approver | User Guides

Claims submitted awaiting your approval

		EmployeeID	Employee Name	Period	CostCentre	Status	ClaimAmount	NonGBPAmount	ClaimRef	Approve	Reject
<a>View</a>	<a>ViewHistory</a>	12068	Bob Engineer	Aug-Sep 2012	24021	Submitted	102.84		20120812068C01	<button>Approve</button>	<button>Reject</button>

You can 'drill down' to view the claim details using the [View](#) link in the left hand column.



Logged in as Robert Carnell

View Selected Claim

Home | Back

Surname: White Forenames: Robert Employee No: 12068 Job Grade: 5E Cost Centre: 24021 Car Registration: WP11EBV Report To: Robert Carnell

Claim Summary from Period Aug-Sep 2012

	Date	Area Worked	Business Miles	Personal Miles	DC Fuel	Non DC Fuel	Non DC Fuel VAT	DC Oil	Non DC Oil	Non DC Oil VAT	Daily Allowance	Service	Travel	Misc	Vat Other	In House	Entertaining	Casual Mileage
<a>View</a>	24/08/2012	Customer Visit	245		84.22													
<a>View</a>	25/08/2012	Personal																20.00
<a>View</a>	27/08/2012	Customer Visit	42															
<a>View</a>	28/08/2012	Customer Visit	54											8.00	1.33			
<a>View</a>	29/08/2012	Customer Visit	67															
<a>View</a>	30/08/2012	Customer Visit	91										5.00		0.83			
<a>View</a>	31/08/2012	Customer Visit	88		74.55													
<a>View</a>	03/09/2012	Customer Visit	101	10														
<a>View</a>	04/09/2012	Customer Visit	102														42.00	
<a>View</a>	05/09/2012	Customer Visit	103								2.50				0.42			
<a>View</a>	06/09/2012	Customer Visit	55						30.00	5.00								
<a>View</a>	07/09/2012	Customer Visit	44	20														
Totals:			992	30	158.77	0	0	0	30.00	5.00	2.50	0	5.00	8.00	2.58	0	42.00	20.00

### Example 55 Viewing a claim submitted to you by Robert White aka Bob Engineer

You can 'drill down' to view the details for each day using the [View](#) link in the left hand column.

Any explanatory notes that the claimant has added to the claim on submission can be viewed by using the [View History](#) link in the next column.

Date	Claim Ref	Action	Notes	Updated by
18/09/2012 10:07:13	20120812068C01	Claim Submitted	Had permission to use own vehicle - company car in for service	Bob Engineer
18/09/2012 08:47:17	20120812068C01	Input	Claim added to expenses database	Bob Engineer

This information will also have been sent to you via email when the claim was submitted.

**NB** If you do not approve the claim within 2 working days of its submission, the system will send you an email reminder.

## Manager - rejecting a claim

If you want to reject the claim, click the **Reject** button alongside the claim on your home page.

The screenshot shows the 'Reject Claim' form. At the top is the Jungheinrich logo with the tagline 'Machines. Ideas. Solutions.' and the title 'Reject Claim'. Below the logo is a navigation bar with 'Home' and 'Back' links. A form section contains input fields for 'Surname: White', 'Forenames: Robert', 'Employee No: 12068', 'Job Grade: SE', and 'Cost Centre: 24021'. Below this is a 'Reject Claim for Period' section with a text area for 'Notes' containing the text 'Nuts and bolts should come under Service Materials not Miscellaneous - please correct'. At the bottom are two buttons: 'Reject Claim' and 'Cancel'.

You must enter a value in the **Notes** field to explain your reason for rejection. This will be emailed to the employee and will be visible in the claim history. Click the **Reject Claim** button to reject the claim or **Cancel** to return to the previous page.

## Manager - approving a claim

If you want to approve the claim, click the **Approve** button alongside the claim on your home page.

The screenshot shows the 'Claims submitted awaiting your approval' table. The table has columns for EmployeeID, Employee Name, Period, CostCentre, Status, ClaimAmount, NonGBPAmount, ClaimRef, and two action buttons: 'Approve' and 'Reject'. The first row shows a claim for EmployeeID 12068, Employee Name Bob Engineer, Period Aug-Sep 2012, CostCentre 24021, Status Submitted, ClaimAmount 102.84, NonGBPAmount, and ClaimRef 20120812068C01. The 'Approve' and 'Reject' buttons are visible next to the claim.

Claims submitted awaiting your approval											
		EmployeeID	Employee Name	Period	CostCentre	Status	ClaimAmount	NonGBPAmount	ClaimRef	Approve	Reject
<a href="#">View</a>	<a href="#">ViewHistory</a>	12068	Bob Engineer	Aug-Sep 2012	24021	Submitted	102.84		20120812068C01	<a href="#">Approve</a>	<a href="#">Reject</a>

If there are no more claims awaiting your approval you will see this message on your home page:

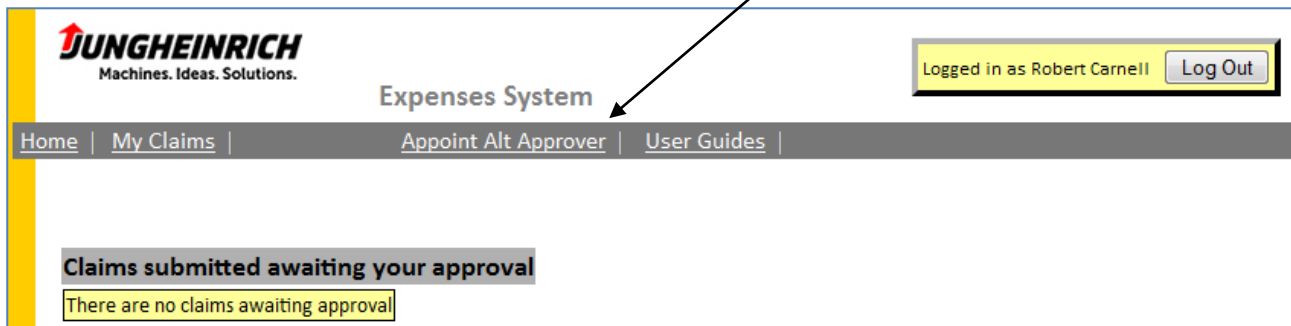
The screenshot shows the 'Claims submitted awaiting your approval' message. The message is displayed in a box with the text 'There are no claims awaiting approval'.

Claims submitted awaiting your approval											
There are no claims awaiting approval											

## Manager - appointing an alternative approver

If you know that you will be away from work at the time expenses claims will require your approval, you can appoint a temporary alternative approver.

From your home page select the Appoint Alt Approver link.



**JUNGHEINRICH**  
Machines. Ideas. Solutions.

Expenses System

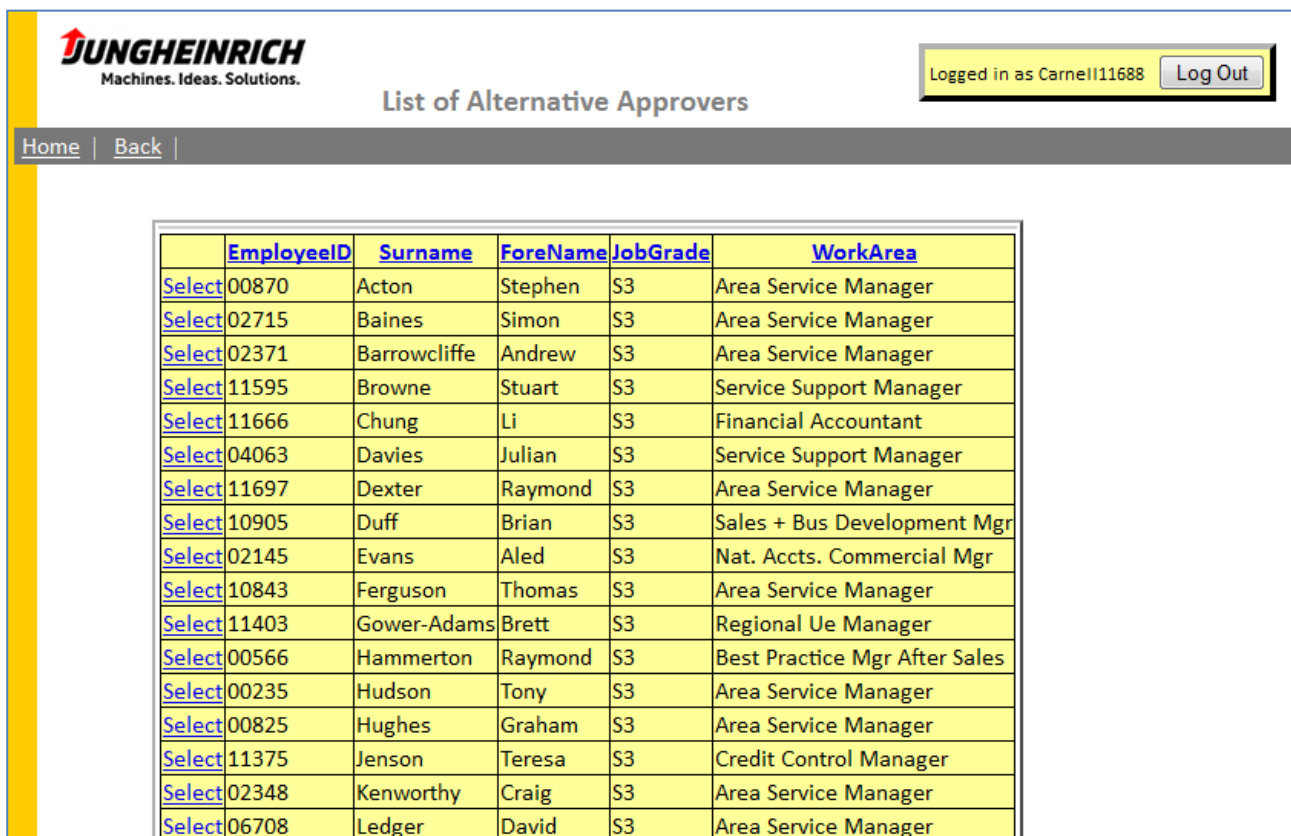
Home | My Claims | Appoint Alt Approver | User Guides |

Claims submitted awaiting your approval

There are no claims awaiting approval

Logged in as Robert Carnell Log Out

You will be presented with a list of employees who are at the same job grade as yourself, or above.



**JUNGHEINRICH**  
Machines. Ideas. Solutions.

List of Alternative Approvers


Home | Back |

	EmployeeID	Surname	ForeName	JobGrade	WorkArea
<a href="#">Select</a>	00870	Acton	Stephen	S3	Area Service Manager
<a href="#">Select</a>	02715	Baines	Simon	S3	Area Service Manager
<a href="#">Select</a>	02371	Barrowcliffe	Andrew	S3	Area Service Manager
<a href="#">Select</a>	11595	Browne	Stuart	S3	Service Support Manager
<a href="#">Select</a>	11666	Chung	Li	S3	Financial Accountant
<a href="#">Select</a>	04063	Davies	Julian	S3	Service Support Manager
<a href="#">Select</a>	11697	Dexter	Raymond	S3	Area Service Manager
<a href="#">Select</a>	10905	Duff	Brian	S3	Sales + Bus Development Mgr
<a href="#">Select</a>	02145	Evans	Aled	S3	Nat. Accts. Commercial Mgr
<a href="#">Select</a>	10843	Ferguson	Thomas	S3	Area Service Manager
<a href="#">Select</a>	11403	Gower-Adams	Brett	S3	Regional Ue Manager
<a href="#">Select</a>	00566	Hammerton	Raymond	S3	Best Practice Mgr After Sales
<a href="#">Select</a>	00235	Hudson	Tony	S3	Area Service Manager
<a href="#">Select</a>	00825	Hughes	Graham	S3	Area Service Manager
<a href="#">Select</a>	11375	Jenson	Teresa	S3	Credit Control Manager
<a href="#">Select</a>	02348	Kenworthy	Craig	S3	Area Service Manager
<a href="#">Select</a>	06708	Ledger	David	S3	Area Service Manager

Logged in as Carnell11688 Log Out

Click the **Select link** alongside the employee you wish to appoint to approve your claims in your absence.

The Assign an Alternative Approver page will be displayed so that you can enter the dates:




## Assign an Alternative Approver

[Home](#) | [Back](#)

### Appointing Alternate Approver

Approver Name: Simon Baines

Date From:  

Date To:

**Date from** - the date from which this appointment starts

**Date to** - the date the appointment ends

Select the dates required from the Calendars, then click the **Update** button.

The individual that you have appointed as your alternative approver will be sent an email informing them of your action, and the confirmation box will be displayed to you:

Simon has been notified as your Alternative Approver

### Manager - removing an alternative approver

If you have previously set up an alternative approver and now wish to remove them, select the Appoint Alt Approver link from your home page.

The existing appointment details will be displayed:

### Appointing Alternate Approver

Approver Name: Simon Baines

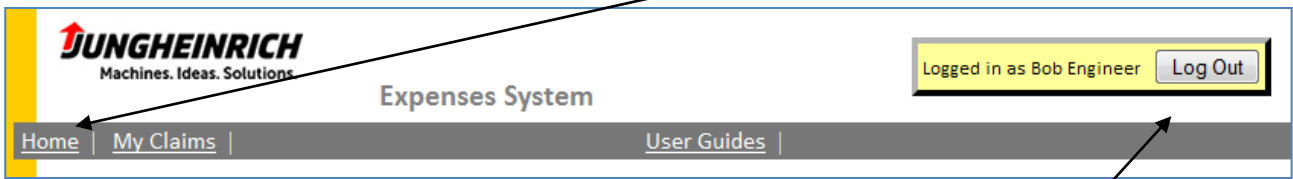
Date From:  

Date To:  

Click the **Remove button** to cancel this appointment.

## Logging out of the system

From any page, click the **Home** link in the menu bar:



The **Log Out** button can be found at the top right hand corner of the home page.

Click this and you will be returned to the login page.